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Customer Journey Mapping

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Abstract

Customer Journeys are the modern version of customer processes. They describe how customers will travel from a desire to an outcome. If you want to put the customer at the heart of your business, ensuring long-term success, Customer Journey Mapping is something you will have to do to get there. This book gives you one of the best methods in Customer Experience Management industry to do that. And the advice in this book will not just "get you there", it will place you right in the top against the competition doing Journey Mapping.

In case you want to increase financial success of your organisation by increasing revenues, the world-class approach presented in this book will give you a powerful method for identifying missed revenue opportunities. Companies using this approach have seen revenue increases of 20-80% in just a few months.

Lastly, if you want to decrease costs or increase profitability, the optimisation technique presented at the end of this book can do that for you efficiently. The worst result we have received using this method have been around 20% optimisation against the current base, but typically we have seen cost effectiveness improving anything between 20–80%. The elegance of this approach is that you can choose how much effort you put into it and therefore get out from it. This makes it easy to balance the right level of return on investment.

This book is a recommended reading for anyone dealing with customer experiences or business processes. It is also suitable for those who want to learn how to optimise business using customer-centric techniques. Here are some of the benefits the Customer Journey Mapping can bring to your organisation:

- Finding new revenue opportunities
- Optimising work based on customer-centric approach
- Minimising waste in processes
- Improving customer experience and satisfaction
- Identifying the areas that are most important for customer (key drivers for business)
- Decreasing customer churn
- Improving customer metrics, such as Net Promoter Score and Customer Effort Score
- Maximising customer lifetime value
- Improving employee and customer engagement

The author of this book, Dr. Janne Ohtonen, is an experienced customer experience and business process management consultant, with 15 years of experience in challenging business situations. He has worked with companies like British Telecom, Pfizer, Apple, IAG Group, Avios Group Limited, RM Results, Bristol Myers-Squibb, UK Broadband, British Airways, Iberia, Vueling and Satmetrix. Dr. Ohtonen has also published several books on customer-centric business process management and capabilities.

Dedication

This book is dedicated to all those brave people who go across the traditional business approaches to create something far better.

Acknowledgements

This book has been influenced by many capable who have come before me and prepared a way for one of the most effective business optimisation methods available today. I will share some great, relevant books at the end of this book for you to enjoy also.

I want to thank my family who have supported me for decades on this road to better business methods. The information shared in this book has taken thousands of hours to trial and countless of nights away from home. Thanks to my family and friends.

Thank you for my business and life mentors who have helped me to grow not only as a subject matter experts bur also as a person. There are too many of you to name all, so here are few that I want to mention in this occasion in no particular order: Anthony “Tony” Robbins, John C. Maxwell, Robin Sharma, Hank Brigman, Colin Shaw, Ian Golding, Harri Kulmala, Anthony Pearmain, Mark McGregor, Forrester Research, Gartner Research, Professor Ranjay Gulati, Bain & Co, BPTrends, Richard Branson, Barbara E. Bund, Business Process Management Initiative, Jan Carlzon, Customer Process One Council, Dr. William Edwards Deming, Peter Drucker, Tony Hsieh, Ipapi, Dr. Joseph M. Juran, Richard Normann, Merriam-Webster Online Dictionary, Open Group, Object Management Group, PMI, Terry Schurter and CVCI.

Final and greatest thank you goes to my Lord and Saviour, Jesus Christ, who makes all this possible.

Why You Should Read This Book?

This is the million-dollar question anyone will be asking when they see this book. This could be a long chapter painting a picture of all the greatness you will receive by reading this book. That just wouldn't be good use of your or my time. Also this book is not for everyone. Why should you read it then?

If you want to put the customer at the heart of your business, ensuring long-term success, Customer Journey Mapping is something you will have to do. This book gives you one of the best methods out there to do that. And this advice will not just "get you there", it will place you right in the top against the competition and others doing journey mapping.

If you want to increase financial success of your organisation by increasing revenues, the approach presented in this book will give you a powerful method for identifying missed revenue opportunities. I can't say how much exactly it will be for you, but we have seen revenue increases of 20–80% in just a few months.

Lastly, if you want to decrease costs or increase profitability, the optimisation technique presented in this book can do that for you. The worst result we have received has been about 20% optimisation against the current base, but typically we have seen cost effectiveness improving anything between 20–80%. The elegance of this approach is that you can choose how much effort you put into it and therefore get out from it. This makes it easy to balance the right level of return on investment.

Let's cut to the chase. Your business makes money from customers. By aligning the organisation better to customers will ensure higher relevance, loyalty and satisfaction amongst your clients. This will lead to previously described benefits in a sustainable way, not just as a fancy economical trick. This will also protect your company against market changes and economic downturn. If this isn't enough reasons to do few workshops, discuss with your people and change few things to get such a powerful return, then good luck… We trust strategy more.

1 Introduction to Customer Journey Mapping

1.1 The Importance of Journey Mapping

Without Customer Journey Maps it will be very difficult for an organisation to understand the world of the customer holistically. Without the maps we have a lot of preconceptions about the customers and what they want to achieve. The gut feeling may or may not be right, but who knows? Once we have the maps on the wall (or in some electronic system), at least we have one agreed model of the customer world. However, it is important to keep in mind that the map is not the territory, as they say in NLP (Neuro-linguistic Programming). In other words, no matter how great map we have, it will always have some degree of disconnection to reality. For this reason, it is important to be specific on what we are mapping, for who and why. Customer Journey Mapping is not a one-off project, but a continuous process seeking deeper understanding of implementing Successful Customer Outcomes.

Choosing the right target customer group being mapped is important, because one size will not fit all. Journey Maps are customer group (or segment) specific and that is why one organisation very likely will end up having many maps. This emphasises the importance of organised approach to Customer Journey Mapping. Many times organisations treat their customers as if they were all the same. Customer specific Journey Maps will show the individual differences and the gaps business has in serving them. This creates a huge opportunity for finding missed revenue and areas of optimisation (from customer perspective).

Here are some of the benefits the Customer Journey Maps can bring along:

- Finding new revenue opportunities
- Optimising work based on customer-centric approach
- Minimising waste in processes
- Improving customer experience and satisfaction
- Identifying the areas that are most important for customer (key drivers for business)
- Decreasing customer churn
- Improving customer metrics, such as Net Promoter Score and Customer Effort Score
- Maximising customer lifetime value
- Improving employee and customer engagement

To bring these benefits to life, here is a story from one of our consulting assignments. We once met a soon-to-be-ex CEO of an IT services company. The company had grown dramatically in the past 10 years from 20 people to over 250 with close to 10-fold revenue increase. Such results would make any CEO proud of his accomplishments, right? Now the board wanted the growth to continue and the company could not find ways to achieve those goals with existing approaches. They already dominated the slowly growing core market and there were no easier wins available. The CEO faced to make a decision: whether to continue the same way as before or to transform. He chose to continue the same way since it had worked well for them so far. What he missed was the market situation change. We did a market analysis from customer perspective and reported back to him that the company will start to decline in the next 6-12 months, because they were offering sub-standard customer experience and the market was saturated. We were let go as consultants for that company since the proposal to focus on customers didn't make sense for the CEO. Three months later the declining started and was in good speed within 6 months. The CEO was fired 9 months later from our engagement. We were hired back by the new CEO and the Customer Journey Mapping exercise started soon after, leading to a renewed 3-year customer-centric business strategy. The company turned around about 18 months later from the initial presentation to the new CEO. All this time was a missed opportunity and lost revenue for the company, because of lack of customer-centric culture and proper framework for Customer Experience Management. Going back to Peter Drucker (1973), "there is only one valid definition of business purpose: to create a customer. It is the customer who determines what a business is. It is the customer alone whose willingness to pay for a good or for a service converts economic resources into wealth, things into goods. The customer is the foundation of a business and keeps it in existence." How's your business doing on that currently?

Customer Journey Maps are important from financial, strategic, operational and psychological perspectives. By aligning business to Customer Journeys, it enables the organisation to identify missed revenue opportunities. By understanding the outcomes and processes customers go through, the organisation can make better strategic decisions on where to focus. As the previous case example of the car factory highlighted, it is one thing to receive operational efficiency through business optimisation and another through customer alignment. Customer Journeys also contribute to various psychological aspects of business such as employee empathy. For many, their work feels meaningless and part of a bigger machinery. Journey Maps can be used to show the significance of any particular work in the grand scheme of things for the customer.

Without aligned Customer Journey Maps, the organisation will not stand a chance on becoming customer-centric. Though that being said, the Maps themselves won't do much good. It is the process of creating those Maps as well as how they are used afterwards. We will discuss later in this book from different organisational perspectives, how the maps can specifically be used by various business functions.

1.2 Customer Journey Map vs. Other Business Maps

As in navigation, there are various mapping methods available in the business world, too. Usefulness of these various maps will highly depend on the 'fit for purpose' as well as what the company wants to achieve with the maps. As you wouldn't use a road map to navigate on the sea, same way we have to use the appropriate maps in the business. For example, if you want to improve your IT infrastructure, you may want to use architecture and system maps. We will discuss in this book mainly those maps that are most relevant from Customer Journey perspective.

As discussed earlier, business process maps are one of the most common and useful maps, an organisation may already have. It is good to notice that they may not be called such in the business though. They may be called workflow descriptions or quality manuals, for instance. These are maps that give details on how something should be done in an organisation. What many times gets missed is that customer experiences are born from the way the things are done in an organisation. This creates a link between the business processes and customer experiences. Still, the emphasis on these maps is different. Usually customer is not included in the process map at all or they are described with lesser details. And that's OK, process maps are for improving internal work arrangements and fit well for that purpose. When organisations align business process maps with Customer Journey Maps, they become a powerful combination of understanding both internal and external perspectives of the business.

Stakeholder mapping is a quite common business activity also. A stakeholder map contains information on who are the relevant stakeholders for various aspects of business. Even though these maps may capture some of the interaction between the organisation and the customer, it is not as detailed as a Customer Interaction map would be. It is fairly easy to align a stakeholder map to Journey Map, if the stakeholder map has already been aligned to existing processes. What stakeholder mapping can add to Journey Mapping is a deeper understanding of which stakeholders connect to specific Journey Steps.

Extending our view on maps, the good old Kaplan's Balanced Score Card (BCD), is a map of one sort. It measures the business from various perspectives. However, it rarely includes metrics from truly customer-centric view. Usually it measures the internal work from 360-degrees angle and customer view from 0-degrees. What we can do, is to use the Customer Journey Map to define the key metrics from customer perspective and to make it a truly Balanced Score Card from both, Inside-Out and Outside-In perspectives.

Another common map, sometimes called a calendar, is a communications map. It shows what messages, campaigns, etc. go out to the customers and when. What is surprising is that they are rarely aligned to Customer Journey, asking "what would the customer like to receive at this stage of journey?". Instead companies focus on the traditional question of "what should we push out and when?". Yes, this might be little oversimplified description of what usually happens when communication calendars are planned, but surely it is easy to see the value of aligning customer communications to their Journeys through this example?

The purpose of this chapter was to give few simple ideas to show, how Customer Journey Mapping can be complimentary and valuable along side with any other business maps your organisation may have. The goal should be to use any available or necessary maps to increase understanding of how to create more value.

1.3 Main Components for a Great Customer Journey Map

In this chapter, you will learn what the main components of a great Customer Journey are. Before we discuss the actual components, it is good to think about, how a great or bad Journey Map could be defined. At the end of the day, isn't it something that is quite subjective? That's true, depending on how you look at things. Luckily in business context, we have already some borderlines, which can be used to narrow the definition of 'greatness' for Journey Maps. These could be things such as company values, objectives and strategies. It is worth the effort to assess, how they could affect the Journey Mapping initiative and requirements for it. Other angle is to think about the 'fit for purpose'. What is it that you want to achieve with the Journey Map? Practical aspect is something to consider also: there is no point in making a map just for the sake of having it (this should not be a 'tick the box' exercise). The map should have some practical impact on the business and how it is conducted. A great Customer Journey Map gives insight that isn't available before. Also it should be used to improve the way the business serves its customers dramatically.

Let's familiarise ourselves with main components of a great Customer Journey Map:

- Customer Journey Steps
- Customer Interactions
- Breakpoints, a.k.a Employee Journey
- Business Rules and Decisions
- Systems and Tools
- Resources and Capabilities
- Stakeholders
- Emotional Journey

Each of the components are introduced in more details in the following sub-chapters. The greatness of any Customer Journey Map should be determined in the light of its fit for purpose for the organisation. Also being able to take action based on the map to improve the business should be considered highly important. Customer Journey Map must contain at least Journey Steps to be called a Customer Journey Map. Other components in the map should all be aligned to the Journey Steps. Now, lets discuss all these components shortly in more detail.

1.3.1 Customer Journey

Let's start with Customer Journey Steps, which are the most important components of a map. The steps define the details of an end-to-end Journey the customer takes to achieve the desired outcome. One of the most common questions around this topic is about the right level of details for a Customer Journey Map. This comes back to previously discussed matter of what you are using the map for. What you need to ask is "How much do we need to know, to know that we know enough?", as someone once said. Any level of detail in the map have different uses for them. Higher level maps are useful for strategic work and lower level for more specific process and system work. We will discuss universal – and customer specific – level maps more in detail later in this book.

1.3.2 Customer Interactions

Customer Interactions are the second most important component for a map. Well, that being said, it again depends on what you want to use the map for. Still, assuming your goal to be a comprehensive improvement of Customer Experiences, Customer Interactions, also called touchpoints or Moments of Truth, are really important. They describe all the interactions your organisation has with customers at any Customer Journey Step. At the end of the day, Customer Experience is the total sum of all the interactions your organisation has with a customer. That makes all these touchpoints very important. Example of a touchpoint could be a person browsing a website. Or customer reading a brochure or using a product. We will later go into details of identifying and mapping Customer Interactions.

1.3.3 Employee Journeys

Breakpoints, or Employee Journeys, are the other side of the "touchpoint coin" (coins have two sides in them, same applies to journeys we are about to map). Breakpoints are all the internal handovers done in the organisation. This is where the most of the mistakes affecting Customer Journey origin. It is also where the magic customer sees comes from. That depends on how well, consistently and reliably those internal handovers happen (or not). Hence the name Breakpoint. Examples of Breakpoints could be Mary asking John to take a cup of coffee to a customer's table. Maybe John remembers to do it or maybe not. It could be also a database administrator updating customer records. Or a boss asking an employee to do something.

1.3.4 Business Rules and Decisions

Business Rules and Decisions are a part of Customer Journey that affect its course consistently. To think of it, it is almost funny how many rules companies have that people are not even aware of. Some of them may be formally expressed, some not. It is very important to know where these Business Rules origin from and whether they are still valid. Would it be too harsh to estimate that many of the Business Rules in your company are unknown, outdated or obsolete, too? Based on my empirical experience with many companies, there is a good chance for that, at least. Example of a Business Rule is a situation where customer has to pay extra charge for using a credit card. Another example is when a customer is required to provide the company with three different proofs of address. The secret with Business Rules is not to evaluate whether they make sense for the business, but for the customer.

1.3.5 Systems and Tools

Systems and tools are important part of delivering customer experiences as part of a journey. If the employees have the right and effective IT systems as well as tools available, it makes it easier to serve the customer. How many times has someone told you that they would love to help you, but they can't because of the systems? That is an example of a situation, where the Systems and Tools have not been aligned to Journey and the successful customer outcomes. Systems and Tools shape the journey through enabling and limiting what the organisation can do for the customer. To be more exact, it is the way these systems have been designed and implemented that limits us. This could be also through having under invested in upgrading and improving these tools over time.

A great Customer Journey Map takes any relevant Systems and Tools into consideration. They can be mapped for each Journey Step and used to evaluate whether the current systems and tools are sufficient for ensuring smooth Customer Journeys. As an example, how many times have you visited a coffee shop that accepts only cash? It is very likely that they have not invested in appropriate systems to be able to accept card payments.

1.3.6 Resources and Capabilities

You can map other resources and capabilities as part of the Customer Journey Map as it makes sense for your business. Highly specialised businesses may especially benefit from mapping the critical resources. Examples of this kind of Resources or Capabilities could be social skills for handymen entering customer premises (their behaviour at the site is part of the journey as well as one important touchpoint).

Also mapping stakeholders can be useful in businesses where there is a wide cross-departmental co-operation required to serve customer journeys. This will bring visible any potential gaps in collaboration and communication both internally and externally.

1.3.7 Emotional Journey

Customer Emotions are typically a less talked about component in the Journey Maps. Still, they are one of the most important ones too (besides touchpoints). We people are emotional beings. We have constantly various feelings guiding us. Every Customer Journey evokes some emotions whether we wanted or not. Even not having any particular feelings in some situation is a feeling (replacing some other feeling the customer could have on that time with indifference). Why this is important for the Journey Mapping is because we want to understand and evoke desired Emotions instead of random ones. For example, Starbucks wants to make you feel like home when you go in. Apple invokes creative and significance feelings in their customers. Avios can give you a feeling of earning a holiday while doing every day shopping. All these emotions are important for the customers along their journey to reach the desired outcome.

1.4 Summary

You can map all the various Customer Journey Map components following the instructions presented in this book. That will give you an aligned, holistic Customer Journey Map. Another option is replacing the Breakpoints, Business Rules, Systems and Tools with a more traditional process map (e.g. using BPMN modelling notation). There are several ways to go about it. If the organisation already had process maps, then it is a matter of aligning them to the Journey Map. Another option is to do the Customer Journey and process maps separately and then combine later. The best approach depends on what maps the organisation already has, what is the goal for the mapping exercise and what is the nature of the business. We will discuss different maps in more detail later in this book.

1.5 Benefits of Journey Mapping

One of the biggest questions to ask before getting down to Customer Journey Mapping is that what benefits it can offer. As always in business, the effort has to bring forward positive return on the investment. It is a shame that most of the real benefits from Journey Mapping are really hard to put into plain financial terms. However, this doesn't mean that there wouldn't be many.

For example, how much is it worth for your company to be relevant for customers? Or what financial value can you claim on new, innovative revenue sources that are waiting to be found? Or cost efficiency that stems out from optimising the business from customer perspective, instead of traditional cost efficiency? What's the price tag on the garment of shared culture amongst all employees? Or understanding of meaning of one's own work in relation to the successful customer outcomes?

It Is Priceless!

Don't take me wrong. This isn't a perfect excuse for some fluffy mapping exercise. On the contrary. You should already know, or at least have some idea of, how the Customer Journey Mapping will shape the company when you start it. I have written it before and will say it many times again, mapping for the sake of mapping is useless. But mapping for the sake of understanding the customer better, aligning business to market and innovating is very useful.

Here are some examples of what is going on in the world currently regarding Customer Journeys and Experiences:

- Close to 80% of companies plan on dedicating significantly more or somewhat more effort to improving their experience. (Source: Temkin Group)
- Over 60% of customers switched service providers due to poor customer experiences. (Source: Accenture)
- Close to 90% of customers would pay more for a better customer experience, but only 1% of them feel that organisations consistently meet their expectations. (Source: Forbes)

- Benefits of Customer Journey Mapping are highly context dependant. What you will get out from it will depend on what you put into it and what you want to get out of it. Some of the typical benefits include:
- Shaping the company culture to more customer-centric.
- Improving customer service and experience.
- Standardising the language used in the organisation.
- Finding the common denomination for all the departments in the business.
- Aligning customer metrics to journey, making them more relevant.

Customer Journey Mapping is not the panacea for Customer Experience Management, but it certainly is one of the main components to be successful at it. We will discuss the benefits of Customer Journey mapping in more detail from specific departments' view in the next sub-chapters.

1.4.1 For Frontline Staff

There are plenty of benefits for front line employees to be engaged with the Customer Journey. Let's discuss two of them in more detail: understanding the end-to-end Customer Journey (and the related outcomes) and the Next Problem Prevention (NPP). These both are contributing to proactive, long-term customer value, but they are rarely considered from this angle. That is mainly due to most companies being more organisation- than customer-centric. Since you are reading this book that is already a great show of desire to become customer-centric and therefore successful!

Let's start with the understanding of the end-to-end Customer Journey and the related outcomes. When working with customers, it is beneficial to know how that specific Journey Step relates to the whole Journey. It puts the Customer Interaction into right perspective. Maybe the current Interaction is just a small thing, a hygiene factor, or maybe it is one of the most important parts of the Journey. Being aware of this helps to handle the things appropriately. To ensure remarkable Customer Experience, the front line staff should know how this part of the Journey impacts the desired outcome. This makes both, the work and the customer, feel more meaningful. Employee is not just a cog in the corporate wheel anymore. For example, a customer wants to look affluent and comes into a clothing store. Sure, we'll sell them fancy clothes, but we could also offer hairdressing and other services (e.g. through our partners). This way we are serving the customer outcome more holistically by addressing the desire to look more affluent beyond what we do as our core business only.

The second important benefit for front line staff from the Customer Journey Mapping is the Next Problem Prevention (NPP). This means that we can anticipate some potential challenges the customer may face next and work to prevent those proactively. As an example, a customer wants to communicate better and increase their personal availability. As a solution she decides to acquire a new unlimited calls SIM card for her iPhone. She goes into a telecommunications online store and orders the new mobile subscription. It will come through mail in the next couple of days. The Next Problem Prevention based on the Customer Journey could look something like this: assuming that she is only switching the SIM card and not the phone, we could ask whether she has that small pin to eject the old SIM out or whether we should include a new one. Or to make the journey even more simple, we could just include it in the package. Otherwise we may run into a service call from her asking how to switch the SIM. This is just a simple example, but hopefully gives you ideas on how the NPP works in principle along the customer journey. The Next Problem Prevention could be also turned into Next Opportunity Creation and offer adjacent value that would be highly relevant for the customer. Building on the previous example this could be for example adding an offer for new phone cover.

1.4.2 For Business Operations

Business operations refers to all those people who work in the organisation to produce value for the customers. There are several benefits for business operations to be gained through Customer Journey Mapping. They are not only around understanding customers better, but also around optimising the work from customer view.

Let's start from the customer understanding. It is surprising how much of a workforce may be disconnected from the customer. Many employees are not in direct contact with the customers and therefore feel like customers do not matter as much as the internal dealings do. This is really dangerous for the business especially if this happens at the top management! The late Nokia mobile phone manufacturer is a great example of such. They had the technologically best mobile phone in the world, but it wasn't relevant for the customers and therefore ended up being bought by Microsoft and later closed down. When Apple came to market with its first iPhone, which was technically much more inferior, they still overtook the market because they had understood the customer outcomes way better (thus being relevant). This shows that you may have the best processes and products in the world, but you still can go out of the business by not being aligned to customer outcomes properly.

Customer Journey Mapping can give business operations both the reason and the way. While conducting hundreds of Customer Experience Innovation workshops, we have noticed that organisations tend to be operations heavy on some parts of the journey and light or non-existent on others. While this may make sense in some cases, it is more desirable to have consistent delivery on all journey steps. This makes some of the traditional management views obsolete that claim the company should identify its core business and get rid of everything else. For example, a car, service business would do just that and would not wash cars. However, this view isn't valid anymore (if it ever was). Today customers value more holistic value chains that can address their needs with one stop solution. Of course, there are still some customers who have price as the main motivator and are willing to tolerate higher effort. And this is a good reason to align operational efficiency to customer outcomes; ensuring both great price and relevance.

Aligning business processes into Customer Journeys will show which parts of the journey are under or over served, where the opportunities for revenue and profitability growth are and where the true cost effectiveness is hidden. We will discuss later in this book how this can be done. In one case example we were able to generate close to £800k for one of our customers in just 4 months. This was possible through mapping out the Customer Journey and aligning the internal processes to it. Looking at that map it was evident that there was a long piece of process, which was unnecessary from customer value perspective. By removing that work the Customer Journey become faster and saved around £70k per month in costs. No one even noticed that this piece of process was removed since it didn't really contribute to anything. How many redundant processes do you reckon your organisation has?

1.4.3 For Support Functions

One of the most common misconceptions is that the back office, or support functions, don't have much to do with customers. Let's make it clear: customer experiences are everyone's job! Even thought the support functions may not be in direct touch with the customers everyday, what they do impacts the customer indirectly anyhow. As an example, you wouldn't think a cleaning lady has much to do with the customers in a software programming team? As it once happened, one of the team mates accidentally tipped over his coffee mug. He did his best cleaning the table, trying to save some sticky notes from the previous planning session. Later an evening came and the cleaning lady (could have been a man too as far as I know) did her work. Next morning the programmer returned to work and to his amazement, the table was spotless clean… Including all the sticky notes from the day before. He relentlessly searched all the rubbish bins and contacted the cleaning company. But it was too late. The bins had gone out to be collected and were probably at the local landfill already. So the programmer had to spend great deal of time to speak to various stakeholders to reconstruct the plan.

The previous real-life example may be a bit extreme, but it does highlight the point. Underestimating the importance of support functions' contribution to Customer Journey is not a good idea. It may make sense to go through the Customer Journey Maps with them to do discuss, which parts of the journey they have the most impact on and where they could help even more. We will come back to this later in this book while discussing taking action based on the Journey Maps.

1.4.4 For Finances

Finances and business planning should be well connected to end-to-end Customer Journeys. Being aligned to customers may alleviate many challenges related to budgeting, financial year planning, invoicing, debt collection and so on. Also understanding the financial linkage between any potential suppliers (or subcontractors) and the customer will help to optimise resources.

Companies are great at creating rules and many of them come from the financial processes. Therefore, it is usually a good idea to include people from the financial department especially into Business Rules mapping exercise, which will be discussed later. We once consulted a small private hospital chain with six hospitals in their invoicing process. It didn't take long after the Customer Journey and Business Rules mapping exercises to see that the Rules were not aligned to the optimal Customer Experience. The existing processes were imposing too many restrictions that caused not only high customer dissatisfaction, but financial loss for the company, too. After aligning the Rules to Customer Journey and streamlining the invoicing process, they saved over £200k in costs for the first year. Also customer satisfaction increased since the financial processes were better aligned to their needs.

Third interesting point for financial departments is to use the Journey Maps to identify any missed revenue and profitability opportunities. Many times financial processes are designed around cost optimisation and it gives a new view into financial planning to be able to work on the opportunities also. As an example, improving customer satisfaction requires the organisation to make an invest. It is possible to calculate the cost of that investment as well as the ROI (Return On Investment). This aids in making the decision based on financial outcomes for the business.

1.4.5 For Human Resources

Human resources are in key position for a company to succeed in its endeavours to improve Customer Experiences. As today many companies provide human-to-human services (and even all the products are at the end provided by humans one way or another), the organisation needs the right kind of employees. Customer Journey Maps can give information on what kind skills, personalities, etc. are needed along the Journey to provide customers more value.

As we all know HR usually deals with matters such as job descriptions, recruitment, training, employee evaluation, remuneration and promoting. Usually these activities are done from the organisational perspective rather than customer. The challenge in that it will make the gap between the desired workforce behaviour (and skills) and the customers bigger. If HR was to complete the previous actions from more customer-centric angle, then they would steer the organisation into right direction by what they do. HR should ask for every decision they make, how does it impact the Customer Journey and especially successful customer outcomes.

One commonly used term is an 'internal customer'. We do not support using that term, because it may easily misdirect the HR people to think that the employees are customers. Unless the employees pay for the company (usually it is other way around), also HR should save the customer term for paying customers and use the word employees or equivalent instead. Though the admirable side of that 'internal customer' term is the previously described idea of HR enabling employees to serve the actual customers.

1.4.6 For Information Technology Department

One of the biggest gaps between the customers and the organisation are many times created by the information technology (IT). This shows painfully often as various limitations and bugs (or features as Microsoft calls them). Don't take me wrong, this is not an attempt to accuse IT people for bad work. Quite often they won't have any connection to customers. Typically, business departments translate the customer needs into business cases, which are then translated into software implementation. No wonder what the customer wanted originally and received eventually are so far from each other?

I can still remember an IT project where the team was forbidden to speak to the customer. All communication had to go through the appointed internal project manager only. There were many situations where the software was shown to customer and it was "all wrong" according to the customer. It leads the project to run over the original budget four times. Project manager was replaced several times, but the process not. Finally, the customer was so frustrated that they took the company to court. Two years later the project was given to another company. They started using an agile project management approach and made the project ready in six months. They placed the whole IT team in to customer premises to made sure there is unhindered communication between all the relevant stakeholders. Also constant delivery of parts of the software for review ensured that the customer received the value they wanted.

What does this have to do with the Customer Journey Maps? Think about all the gaps the traditional waterfall software development leaves compared to agile approach:

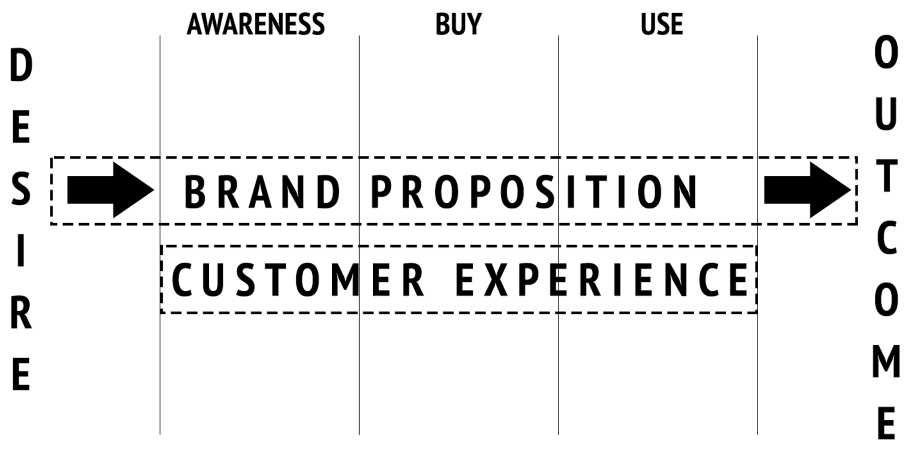
- Disconnection between the implementation team and the customer
- Big software bundles, which are hard to test and improve
- Inflexibility of change process
- Difficulties in forecasting progress

By connecting the information technology people and the customer outcomes they had to produce what was relevant to the customer. This made the Customer Journey smoother and increased the success for the project. It only makes sense when you align the Customer Journey Steps to Breakpoints and see how the two support each other.

1.4.7 For Marketing

The connection between marketing and Customer Journeys seems like quite self-evident. Still it is fairly rare that marketing departments actually use the Customer Journey Maps to understand deeper, how they could add value. In the old world, that is 10 or more years back, people weren't so badly saturated by various messages as they are today. How many days do you feel like you are receiving too many emails? How many times do you actually pay attention to all the posters and billboards all over the city? I would suspect, not often. This is why marketing is losing its meaning in the traditional sense. Luckily, Customer Journey Maps can come to the rescue (at least partly)!

What if we turned the whole purpose of marketing upside down? It wouldn't be anymore about pushing messages out, but it would be a meaningful way of having valuable conversations with the customers. This kind of approach would add so much value for customers that instead of trying to deflect your messages, they would be graving for them. To get to that position, your marketing would need to be highly relevant for the target audience. It would need to give something that is asked for and needed. This is where the Journey Maps can shed some light in to.



Picture 1. Brand Proposition

One key role for brand proposition is to manage expectations of the customers. We can assume that either the customers already have desire for some specific outcome or we can use appropriate marketing to create one (unrecognised desire). Think groceries vs. the latest Apple iPad. Everyone has a constant desire for food (with the outcome of staying alive), but one wouldn't buy the latest iPad unless there was some desire, either born from the environment or aroused by marketing (e.g. authors to be able to write a book while commuting to office). Still, not everyone would buy an iPad, so it has to be somehow relevant for the customer's desires, needs or outcomes.

Customer Journey Mapping sets different purpose for marketing through out the journey. In the beginning of the journey it may be more about motivation (why do I desire the outcome?), awareness (what can I do?) and commitment (which will I choose?). Later it becomes more about learning and understanding around the outcome. Then adoption and using, potentially also service. At the end of the life cycle matters like disposal of the product or ending the service contract may become more relevant. Marketing can add value through out this journey by aligning itself to appropriate Journey Steps as the life cycle evolves for the customer personally. This makes the company more relevant for the customers, too.

The biggest benefits of Customer Journey Mapping for marketing are:

- More relevant messages
- Better personalisation
- Increased timeliness
- Higher value for Customers
- Alignment to customer outcomes
- Efficient utilisation of marketing budget
- More precise targeting

1.4.8 For Suppliers and Partners

The further we go from the customers in the value creation chain, the harder it gets to produce the desired outcomes. This is probably one reason why so many companies use Service Level Agreements (SLA). They try to ensure that the whole process from the external suppliers and partners is aligned to final customer outcome. Journey Maps will help to take this approach further than just SLA's. If the supplier understands their role better in the customer ecosystem, they can make more informed decisions on how to add more value. You can also make contractual demands for the suppliers or partners, which can address specific Customer Journey Steps.

Suppliers and partners can expand your value chain in many ways. As an example, Uber (world's biggest taxi company) doesn't own any cars. It is all taken care by the Uber partner drivers. Another great example in UK is the Vitality health insurance. They have partnered with Starbucks for coffee rewards and Cineworld for movies. If you exercise enough, record your progress with activity tracker and sync with your mobile, you can get free coffee and movie every week. That is not only a great example of Customer Experience Gamification, but also about understanding the end-to-end Customer Journey and enriching it with partners. Who could your organisation partner with to create such an innovative customer propositions?

2 Introducing Case WWJD – Waving Watchmen Joining Designers

2.1 An Interview of Chief Operating Officer

"I am the Chief Operating Officer (COO) for WWJD and my job is to run the operations of this company. The past 5 years have been really difficult time for us due to the business downturn and decreasing need for traditional printing services. Our revenues have dropped to such an extent; we have not been profitable for the past couple of years. If our decline continues, it is likely that we will be out of business in the next 18 months.

We have hundreds of physical branches in cities both in USA and Europe, typically in demographics of cities where more than 40,000 people reside within a 15-mile radius. We pride ourselves on the quality of our work and the service we give our customers – after all customers are our life blood – without them we would be nowhere. People can easily find us on the Internet and we advertise also in local papers. Typically, they contact us by telephone and specify the print work they require and we discuss a range of production options and binders so they get a great end product. They email us the document they wish to have printed and then they come and collect the finished product. We offer a number of turnaround options ranging from Gold-level, which is 1-hour order to PICK UP to Bronze-level, which is 3 days and cheaper pricing accordingly.

Our main offering currently consists mainly of following services:

- Printing
- Binding
- Finishing
- Direct Mail
- Shipping
- Packing

We are now so customer-centric that we also offer a delivery service to their work address although in reality this is rarely taken up as it adds quite a bit to the cost. The problem is people are spending less, because of the recession. New competitors have emerged who are undercutting our prices so we have absolutely no opportunity to increase prices or otherwise we simply won't get the business. I can't see the revenues increasing in the current financial climate so I need to reduce my costs by at least 25% to remain in business."

2.2 Customer Story

Meet Peter Jones. He is a 43-years old business man. He is a Business Development Director for a company that sells highly complex engine parts for wind turbines. Due to nature of his business, Peter has to explain what their products are and how they help wind turbine manufacturers to save money. He uses wide variety of visual aids when he meets potential customers and these materials are updated regularly to reflect the latest knowledge in the industry.

This time Peter is about to attend a small roundtable discussion in a city far away from his office base. This meeting is important for Peter, because it enables him to influence some key opinion leaders in his industry. He wants to make the materials he will use personal, which means that he needs to update some of the hand-outs he will give and can't use the ones that were ready-made in the office. He decides to make 13 copies of his presentation with personalised front cover for each participant. He wants them to look pristine, which glossy paper and proper bounding. The situation gets even more complicated when he receives new research insights the day before the presentation and they are so remarkable findings that he needs to update the hand-out immediately. It does not leave him enough time to get the hand-outs printed in the place he usually uses.

He searches online for companies that could help him and finds WWJD. He gives a ring to them and he is let known that they won't be able to do it on the same day. He is directed to call the closest branch to the place where Peter will do his presentation the next day. Peter contacts the other branch and the friendly staff from WWJD gives their email address for Peter to send the materials in to. They also promised to have them ready and waiting for Peter the next morning so he can go and pick them up.

The following day Peter wakes up early to be on time to pick up the new hand-outs from the WWJD branch. He travels in time to be waiting behind the door to pick up the materials when the branch opens. After 15 minutes of waiting at the branch they finally open up in the morning. It was a shame that this branch wasn't one of the many 24-hour branches WWJD has. Anyway, Peter receives his materials and is happy with them. He pays the materials with his personal credit card and will claim it back later in company expenses.

Peter jumps back to his rental car that he picked up from the airport in the morning and drives quickly to event venue. He places the materials on the table and makes himself ready for the soon to start round-table discussion. The day goes well, the new research insights are received well and Peter makes great contact for future discussions with the key opinion leaders. Despite the busy morning, Peter does his job well and makes it home later in the evening.

3 End to End Customer Journey Mapping

3.1 Deciding Whose Journey Is Mapped Out

First thing to do is to define whose Customer Journey we are going to map out. This is the starting point for the whole exercise. What I have to point out is that the chosen customer cannot be just anyone nor everyone. The chosen customer (or group) has to be specific. When choosing the customer group, it is good to take into consideration the various aspects related to your business and customers. These are things such as:

- Are you in a niche or mass market business?
- Do you have few or many customers?
- Are your customers very different from each other or similar?
- How well are your customer segments defined?
- Do you operate in the free market or in regulated?

After you have answered the previous questions (and any other you consider important), it may already start to be more clear where to start and who to focus on. Using an existing customer segmentation is a great place to start from. Most of the organisations tend have at least some level of customer grouping, regardless of its level of sophistication. Something to consider here is that do you want to only focus on the existing customer base or would it be beneficial to identify new, potential customer segments also? This could help the organisation to innovate new ways to generate revenue from novel sources.

If the organisation doesn't have a clear customer segmentation model, then another potential source for identifying target customer groups can be a customer feedback or a Voice of Customer Programme (VoCP). Using factoring and other statistical analysis it may be possible to find logical customer groups that could form a basis for the initial segmentation.

If the organisation doesn't have any of the previous resources available, you can use so called quick and dirty approach and do the 'Who buys?'-exercise. It is literally as simple as it sounds! You just ask the question "who buys from us?" and list all the customer groups you come up with. When we have been doing this exercise with various companies, we usually do the first round individually or in small groups and then pull together the master list from everyone on the second round. This way it is little bit less likely that some groups get forgotten. The exercise shouldn't take more than one or two hours including the prioritisation we will discuss next.

Whichever way you use to get a list of customer groups; they need to be prioritised. If you have an existing advanced segmentation model, then it is very likely that the key customers are already identified. In case such information is not available, you can use various methods for ranking customers. One quick way to initial customer prioritisation can be achieved using a defined criterion. Here are examples of matters that can be used to give ranking to customer groups: creates most profit or revenue, costs most to serve, causes biggest problems and so on. You can use a scale low, medium and high and see which group gets the most highs and start from there. Even though this is a really simplistic approach, it has turned out to be better than not doing it at all. It is always possible to go back to your model and improve it as you learn more about the customers.

	PROFIT	REVENUE	COST TO SERVE	RANK
Customer Group A	MEDIUM	HIGH	LOW	2nd
Customer Group B	MEDIUM	HIGH	HIGH	1st
Customer Group C	HIGH	LOW	LOW	3rd
etc...				

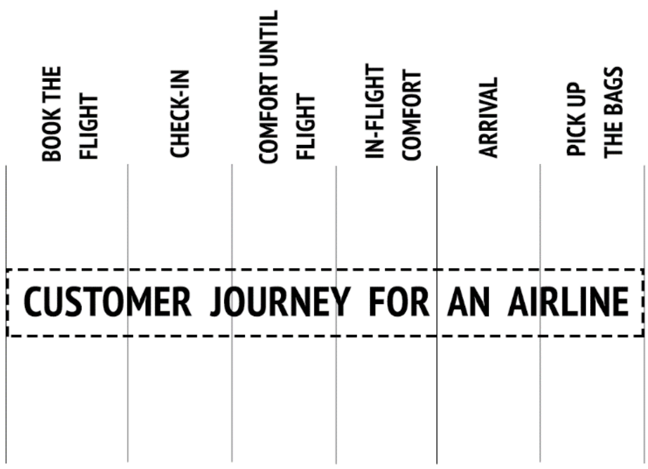
Picture 2. Customer Group

The ultimate goal is to map out all the journeys for all relevant customers and find any common denominators. Depending on the size of the organisation and complexities around the customers, this can take even several months to achieve. However, the mapping exercise shouldn't take too long, because it may go quickly out of date. One media broadcasting company had spent 2 years and over £400k to map close to 300 Customer Journeys. That is simply unmanageable situation and will not bring benefits for the organisation. Like with everything, you should ask the question "How much do I need to know to know that I know enough?" and then maximise the results and minimise the effort.

3.2 Understanding Where the Journey Starts and Ends

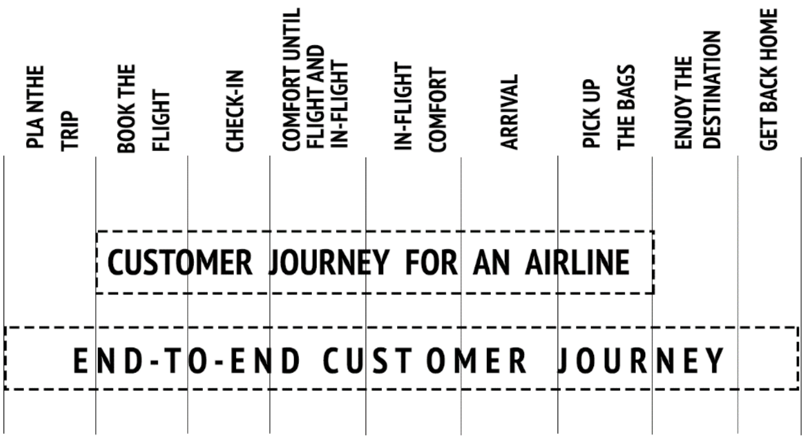
Second important piece of the Customer Journey puzzle to solve is to identify, where the journey starts and ends from the customer perspective. Once we know whose journey we are mapping and what is the perimeter, we are ready for the actual mapping. It is amazing how inclined we are as people to think about the journey from our own or corporate perspective. 9 times out of 10 it takes a bit of extra effort to get the real answer to question "where does the journey start and end from the customer perspective?". But don't worry, that is perfectly normal and takes some practice. Since this is a really important question, let's do one real-life example from aviation industry.

Let's imagine you own a traditional airline. Your core business is to move people and goods from one place to another. Now we are mapping a Customer Journey for a holiday maker, who wants to fly to Sardinia for a beach holiday. Before reading forward, think about the answer to question "where does the journey start and end?". What would be a natural starting point for an airline to consider as a start for a Customer Journey? It is very likely that you thought about online booking website or such. Now what would be the end for the journey? That's right. When the customer picks the bags at the airport. It could look something like this:



Picture 3. Customer Journey for an Airline

Now, is this a real end-to-end Customer Journey? Let's see. Why don't you stand up and shake yourself a bit (change in physical state aids to change the mental state also; so let's do this). Put the metaphorical customer shoes on your feet and ask the question "where does the journey start and end from the customer perspective?". Is it still the same answer as above? Think about it… If you say yes, then you cheated in the shaking exercise! It is clearly not the real end-to-end Customer Journey. So, where does it start for the customer? When they start to think about the relaxation and the holiday. And when does it end for the holiday maker? Not when they pick you the bags, but when they are back at home with great memories from the holiday to share. For the customer the journey may look something like this:



Picture 4. End-to-end Customer Journey

It is a dramatically different picture. We can draw a conclusion from this real-life case example: many times the end-to-end Customer Journey is not the same for the company and for the customer. And that is one of the reasons, why proper Journey Mapping framework can give so much for the business. It reveals gaps, missed opportunities and potential for cost effectiveness improvement.

Always start and end the Journey Mapping from the customer, not company perspective. Make an informed decision, which parts of the journey the company serves and which not. It is much worse to be ignorant and miss the potential due to not knowing than to purposefully choose not to do something. Also, consider using partners for those parts of the journey that the company chooses not to directly serve. Customers will prefer a one-step solution over those companies that offer only small portion of the end-to-end journey (there are exceptions to this though surely). Now the borders of a Customer Journey Map have been defined and we can move in to filling the rest of the journey.

3.3 Identifying a Macro Journey

Macro Customer Journey (MCJ) is a "big picture" of what happens when a customer begins to convert a desire (i.e. a want or a need) into an outcome (i.e. the result). That's why the Macro Journey covers the whole end-to-end life cycle of a Customer Journey and contains the main steps along the way. It is a quite common question, how detailed the Macro Journey Map should be. There are no hard limits for that, but it is a best practice to keep the Macro Journey's length to maximum of 7-10 Steps. The shortest Macro Journey we have come across was described by a banker. He mapped the journey like this: "We take money in, move it around and give it out". Can you spot the mistakes in that? Is that a real end-to-end Customer Journey? No. Is it detailed enough to give a clear idea of the journey from the desire to outcome? No. Actually, it wasn't a MCJ at all since it described what happens from the Inside-Out perspective.

What should a Macro Journey look like then? It could be mapped in linear, circular or into a combination shape. We will see some examples in the following chapters from all of these. To make things little bit more complicated, there are different types of Customer Journeys. They can be Universal, Generic or Customer specific. Regardless of these types, usually you will have only one Macro Journey for each customer segment or group. The type merely describes the level of details and effort spent on them.

Universal Customer Journey (UCJ) has the lowest level of details and personalisation for the Journey Map. It satisfies those companies for who one size fits all or the ones who want to get started from somewhere. And yet, that's not a good reason to dismiss it. The Steps in the Universal Journey are: desiring, understanding, considering, choosing, satisfied, engaging and promoting. The benefit of the UCJ is that it fits the most private organisations from big picture view. We will discuss this in more detail later.

Generic Customer Journeys (GCJ) are similar to Universal one, but are more specific. They span across multiple organisations and geographies within an industry. For example, for a telecommunications industry a Generic Customer Journey could be: awareness, comparison, enrolment, using, renewing. As you see, it applies to most of the customers that utilise telecommunication services regardless of their service provider. Still this journey wouldn't apply well to other industries, like retail.

Customer Specific Journeys (CSJ) are organisation and customer segment specific journeys. This is the most valuable (and hardest) way of mapping Customer Journeys for an organisation. CSJ's can be informed by the other more generic maps. In this book we will give examples of UCJ and GCJ, but majority of the book focuses on the Customer Specific Journeys.

Next step down in the Journey Mapping hierarchy from the Macro-level is a Micro Journey. We will discuss it in more detail later in this book.

3.4 Universal Customer Journeys

Universal Customer Journey (UCJ) is the most generic type of mapping. The best use of it is to have it as a starting point or as a comparison for your Customer Specific Journeys. The steps in the Universal Journey are: desiring, understanding, considering, choosing, satisfied, engaging and promoting. The picture below shows the Universal Customer Journey.

Picture 5. Universal Customer Journey

Let's discuss each of the steps through in more details.

Step 1 – Desiring

We discussed earlier where does the Customer Journey start and end. That is quite a tricky question in the Universal Journey, where we can't be specific. Still, we can come to a satisfactory answer that applies to most organisations. The journey starts for customers from desiring some outcome. This desire could be existing, new (born from inside) or discovered (suggested from the outside). The first one is a desire for an outcome that has once been new (or discovered), but haven't progressed to next step of understanding. This could be, for example, desire to have the feeling of freedom and the wind (i.e. to get a motorcycle or to do sky diving). It may be that the customer has had children, work or something that has prevented her/him from realising this desire. Maybe the timing is now right and s/he starts to acquire understanding. A new desire is born from the inside. It is not much different to existing desire, except from the perspective of recency (having higher potential for moving to next step quicker). The last type of desire is discovered, which is born from an external stimulus. Examples of ways for discovering a desire include participating in education or training, engaging in a company-developed community or social networking site, attending a special event like a holiday party or being exposed to marketing and being receptive. Desires are also born from customer needs and wants that find their way into their lives one way or another. Once desire is born, it is time to move to step 2 and acquire understanding.

Step 2 – Understanding

Understanding is key to customer decision-making, because that is the time they find the necessary information to start considering what to do. Depending on the complexity of the desire, this step can be a highly dynamic phase of information gathering. Customers may interact with many touchpoints to gain the knowledge or information they seek. Today people use increasingly online search and comparison portals to do that.

Step 3 – Considering

In the considering step, the customers are getting closer to decision-making. They evaluate the various options and decide whether they need to return back to Universal Journey steps 1–2. They might return back to desiring step, if they couldn't find an option that works for them. For example, the customer may not afford the motorcycle and returns to dreaming of it instead of acquiring one. Or maybe the customer feels like need to do bit more research and returns to understanding step. Once the customer feels confident with the knowledge and thinks that they are ready to choose, then it they will move to step 4, which is choosing.

Step 4 – Choosing

This is the time when the customer chooses one if the options or chooses to fold completely. Where for us as an organisation the choosing step was first chance to lose business with a customer (by not ending up on the shortlist of options), this is the second critical point for us. Customer hopefully chooses us, but they might go with someone else too.

Step 5 – Satisfied

This is where the commitment has been made and the organisation delivers its value. It is a complex psychological process that will determine whether the customer will be satisfied. In a short, it is best to describe it as the difference between the expectations and what was delivered. Dissatisfaction (or disappointment) is the gap between the expectations and the reality. One might think that this is the end of Universal Customer Journey and for many companies it is (since they don't know better). Customer may be satisfied, but it doesn't make them necessarily loyal or engaged. Think about a new restaurant in your local area. It will have its appeal for a while, but when the next new one opens, you'll be there to test it and if it is better, you'll keep on going there until the next one opens up. This is why restaurants need to renew themselves periodically, because customer loyalty is really difficult for them to maintain.

Step 6 – Engaging

As discussed in the previous step, satisfaction doesn't lead to loyalty always. Thinking about the today's world, loyalty is harder to achieve day by day. Customers go after whatever is most engaging for them. If they stay engaged, they may stay loyal (until the engagement has been lost). Organisations that engage customers well will succeed long-term. It has been proven by research that engaging companies see higher revenue and stock value than their disengaging competition (Watermark Consulting, 2015).

Step 7 – Promoting

Promoting an organisation is the highest compliment customers can give. They think the business is so engaging that they want others to join them, too. This kind of customer advocacy may be bought for very short-term, but it has to earned for long-term benefit. Unless the organisation is engaging both the hearts (feeding the desired outcome) and the minds (best choice) of the customers, they will not acquire significant number of promoters. From commitment-level perspective, satisfied customers have the lowest, while promoters have the highest level of commitment to organisation.

3.5 Generic Customer Journeys

Generic Customer Journeys (GCJ) are similar to Universal ones (UCJ), but are more specific. They span across multiple organisations and geographies within an industry. They apply to most of the customers within an industry. Still these Generic Journeys wouldn't apply well to other industries. At least to date, there are no widely accepted Generic Journeys available from any single source. Both academia and practice are sharing various suggestions for potential Generic Journeys. These can help the organisation to start to shape journeys for their own customers.

An important distinction between business process and Customer Journey Maps is that process maps are usually internal to organisation when Journey Maps are sort of process maps for customers. Sometimes organisations draft Customer Journey Maps based on their own process maps that have a separate swim lane for the customer. That is not a Customer Journey Map, but more like an external view of a process map. Customer Journey Map has to stem out from the customer going from a desire to an outcome from their own perspective.

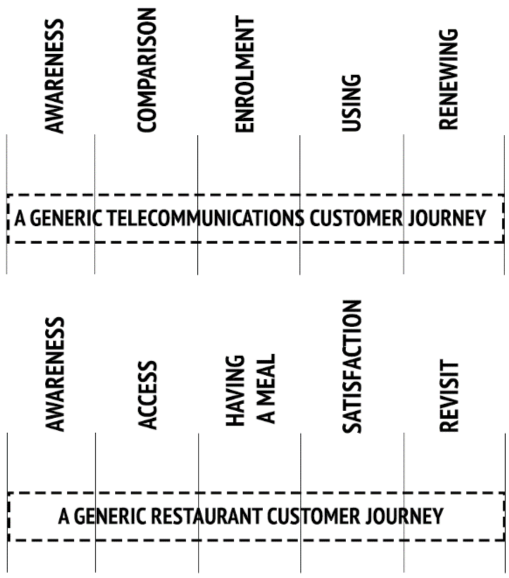
Here are some examples of potential Generic Journey Maps for various industries.

Telecommunications:

- Awareness
- Comparison
- Enrolment
- Using
- Renewing

Restaurant:

- Awareness
- Access
- Having a meal
- Satisfaction
- Revisit



Picture 6. Examples of Generic Customer Journeys

These are just couple of examples for Generic Customer Journeys. You can build your own library of them as you practice the technique. Just choose any industries or businesses that you are interested in and use the advice from this book to map the journeys.

3.6 Customer Specific Journeys

Customer Specific Journeys (CSJ) are the "Rolls Royce" of Customer Journey Mapping. They give the highest value for the organisation since they take into account various aspects related to specific customer segments. They consider customer expectations, market situation, location and many other things making the Journey Map highly relevant. Rest of this book will focus on mapping out CSJ's through cross-departmental workshops.

Customer Specific Journey mapping focuses on the total customer experience across all the touchpoints and channels between the customer and the organisation. That is from the initial desire, through choosing, satisfaction and hopefully onto service renewal or product repurchase. It maps all the elements of the Customer Journey for a specific customer segment, which includes (but is not limited to):

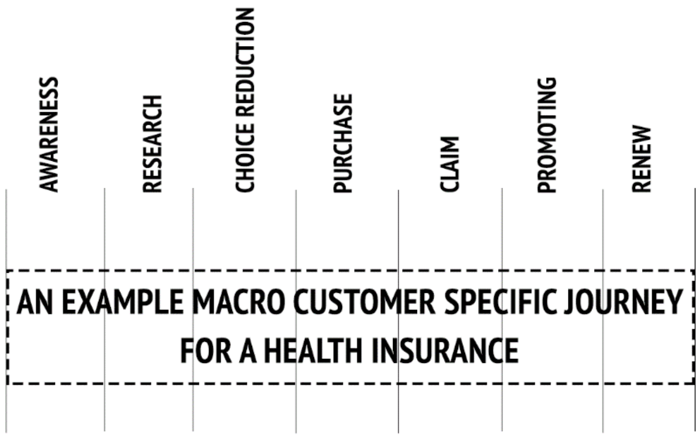
- Customer's desire as a starting step
- The most important factors from the customers' perspective impacting engagement and advocacy
- Touchpoints along the journey
- Internal handovers and business processes impacting the journey
- Systems and tools impacting the journey
- Various customer emotions along the journey
- Successful customer outcome as the final step

Customer Specific Journey mapping should always be an organisation wide, cross-team effort. The purpose of creating a Journey Map is to highlight the impact of all relevant departments across the organisation to customers. All employees influence the customer experience whether they know it or not. Many times the impact of their work may become visible much later steps in the journey. As an example, I had to take my car to service once. They needed to replace a part in the car and as it wasn't a standard procedure, they had to order the part in, or at least that was the plan. We agreed a date and the service manager promised to order the part in. The appointment came and I took the car in. Repair man disassembled the front part of the car and noticed that the new part hadn't been ordered. The car waited in the service pit for two days, taking one service unit out and wasting my time. This happened, because the procurement had forgotten to order the part in time. These are all different functions within the same business, but they are all part of the same Customer Journey contributing to the un/successful customer outcome.

We have already discussed some benefits of Customer Journey Mapping, but let's remind ourselves of what the Customer Specific Journey mapping may help us to do:

- Understand better the end-to-end journey of specific customer groups
- Improve efficiency both from internal and external perspectives
- Remove inconsistencies in the customer's experience
- Implement a more seamless experience across teams, departments and channels
- Redesign existing journeys or innovate new ones
- Assess the impact of internal activities on the customer's experience
- Establish improvement priorities based on customer value
- Develop cross-departmental alignment across the whole organisation

Customer Specific Journeys can be dividing Macro and Micro-levels depending on their details. Let's discuss these further next. A Macro Journey is the overall view of the end-to-end steps the customer will take from a desire to an outcome. Usually CSJ Macro Journey isn't any longer than 7–10 steps or less. This is to keep the Macro map manageable. Also Macro Journey Map doesn't typically contain the detailed information a Micro Journey will (such as touchpoints). Here is an example of a CSJ Macro Journey for a health insurance:



Picture 7. An Example Macro Customer Journey

As you can see, the map contains all the most major steps from beginning to the end. Sometimes it may take time to adjust the scope and the wording for macro journey's (because it has to be condensed information), but that is part of the learning experience experience a Journey Mapping exercise can provide.

3.7 Determining a Micro Journey Step by Step

Macro and Micro-Level Journeys are like world map and a local map. Both have their own uses, and they are not interchangeable. Macro refers to the scope of the perspective we will use: high-level end-to-end Customer Journey. Micro on the other hand has the detailed view, with narrower scope in relation to end-to-end journey. Macro Journey is better for overview and strategic decision-making when Micro Journey offers more value into operational improvement. From this chapter onwards we'll go through creating a full-scale Micro Journey step by step.

Most logical place to start mapping a Micro Journey depends on the objective. If the focus is only on a certain part of the journey, hence there is not necessarily point to map out all the other steps of the Macro Journey in a Micro Map. If the objective is to understand the whole journey, then it is necessary to have all steps in the Macro Journey mapped out. In Micro Journey, each step represents one thing the customer does or thinks. For the clarity of the map, you should not have several different things in a single step.

Let's take some examples of bad Journey Steps:

- Fill in the form and mail it back to supplier
- Take the car to service and wait for it to be ready
- Board the train and find a seat to read a newspaper
- Buy and pay for the product

What is wrong with all of the above? They have several Steps in them, which makes it more difficult to be specific in the later Journey Mapping stages.

And some good ones:

- Fill in the form
- Mail the form back to supplier
- Board the train
- Find a seat in the train
- Pay for the product

What is great with all of the above? They are clear, simple and precise. Don't worry too much about the Steps when you start the mapping. We will add, remove and replace many of them before the first draft of the map will be ready. Also the map should be updated regularly to reflect the changes in the journey and our increased understanding of it.

Now that we are on the same page regarding the scope of a Journey Step, we can describe them individually. Whether you are doing this alone or with a cross-functional team, each should have their own pile of yellow sticky notes. Take enough time for everyone to write their own notes on what happens in the Customer Journey step by step. At this stage it is most important to write one, short and precise title for what happens in that Step.

Picture 8. Example Journey Step

Then move on to the next step. Write out the whole journey, one Step at a time, one step on each sticky note. It makes sense to keep these stickies in order while doing this. Once you are ready, if you have several people, you should add initials to each sticky to know who wrote it (if necessary).

Picture 9. Example Journey Step

If you have challenges keeping the stickies in order, you can add an order number into another corner.

Picture 10. Example Journey Step

At this point, everyone should have their own bunch of yellow sticky notes with an end-to-end Customer Journey described. It doesn't look like a map yet, and that will be sorted in the next phase.

Picture 11. Example Journey Steps Sticky Notes

If you are doing this the first time, it may feel a bit awkward. That's natural and OK. Once you have done this process few times, it becomes easier. Typically, there are quite many questions around should I write this or that on the stickies. Here are some key things to consider:

- Think like the customer, not like the business.
- Include also such steps that your business doesn't deal with, remember this about the end to end micro journey from the customer's perspective.
- Don't write too long descriptions, details will be added later.
- Use clear handwriting so that others can read your stickies and they will be clear in photos also.
- There's no right or wrong, if you think something should be in a sticky, put it out there.

The biggest challenge is to keep yourself in the "customer mode" continuously in this stage. This is all about the customer, it is called a Customer Journey Map after all. It is OK to write down things that the customer needs to do with the organisation, but even those are written from their perspective. As an example, "bring car to service location" would be "take my car to service shop" instead. The view should represent what the customer does from their own perspective.

Another common question is that should real customers be included in this exercise? The answer is yes, if possible. We need to make sure the Journey Map is relevant and accurate snapshot of the customers' reality. Though the map will never be the territory, we want to get as close to it as possible. There are several options for including the customers and you need to choose the best way depending on your access to customers and availability of resources. Let's discuss some of the options to do that.

Including the customer right from the start. This would mean asking some of the customers to join the mapping session. This can be great fun and very educative. Be careful choosing customers who represent the journey you want to map well. Also make sure they are able and willing to voice out their thoughts. Downside of this is that it requires some time from the participating customers. Upside is the immediate contribution and initial validation.

Validating the final map with customers is another option. In this case the organisation would do the map as an internal exercise and then validate the map with the customers. Downside in this one is that if the map needs a lot of changes, you need to be able to receive that information from the customers and then update the map. It may cause several iterations of the map. Upside is that the map won't be just an internal exercise.

Depending on your needs and available resources, the most robust way may be to ask some customers to join the mapping and then validate the final map with other customers. As long as all the customers you chose are relevant for the map, the final version of it should be reliable enough to make business decisions on. As with everything, things change, so make sure to keep the map updated regularly.

3.8 Shaping the Journey on to a Map

At this point, everyone participating the Journey Mapping exercise should have their own pile of yellow sticky notes with individual Customer Journey Steps in them. Each sticky has a short and precise description of the Step and also potentially their initials and the order number.

What we'll do next is to start forming the actual Journey Map. The map itself could be done from left to right, top to down or in a circular shape. Since we will be adding a lot more details into the map, it is recommended to start from the left upper corner of the space you have available and then proceed to the right. At least in western countries, that is the typical way of presenting information and reading books anyway. If you are from a culture where the typical way is to do it from the right to left, feel free to do so.

If you are doing this exercise alone (e.g. to practise this method), you can just lay all the yellow stickies to the wall from left to right (or right to left), in order, in one single line. If you are doing this together with others, count who has the most number of stickies and that person will become the chairman for this part of the exercise. The person will take one sticky at a time from his/her pile and read it out loud to others. If someone has Steps before this Step, then they need to be added first. If someone has the same Step, then our can adjust the title of the Step if needed to accommodate that Step from both of your perspective and then laid on the wall. If someone has the same Step and you agree that the title of the step doesn't need any adjustment, then the extra sticky note can be thrown away.

For the sake of the clarity of the process flow of this mapping exercise, please have a look at the list below.

Setting up:

1. Count who has the most number of Customer Journey Steps
2. That person will become a chairman for this exercise
3. The chairman reads his/her first sticky note

Process:

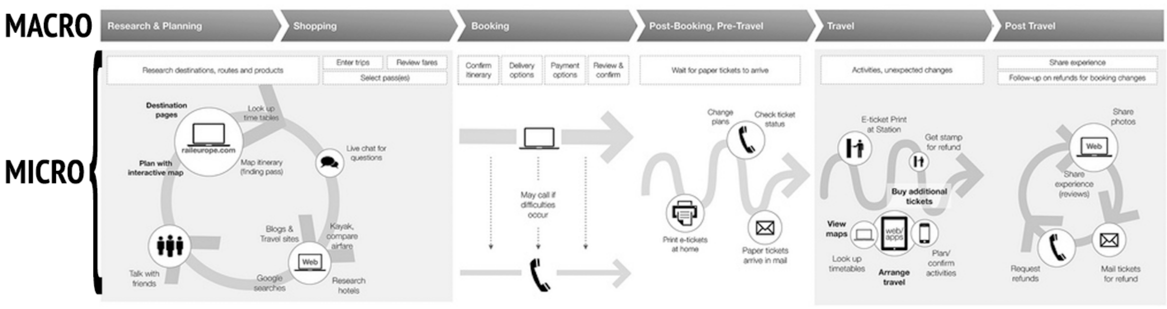
1. Those who have the same sticky note can put theirs away. Those who have a sticky note before the Step that was just read, this will be added before the chairman's sticky note.
2. Once everyone agrees to the wording of the current Customer Journey Step title and previous Steps have been added, the chairman proceed to the next Step (i.e. Sticky note). Continue with previous step 1.

The overall objective of this part of the exercise is to make the Customer Journey visual from all the various perspectives represented in the room. The output is a compromise that should capture all the necessary Steps in the Micro Customer Journey. The final Journey Map formed of everyone's yellow stickies may look something like this:

Picture 12. Example Journey

Once you have laid out all the stickies to the wall (or some other space), you should have an end-to-end Micro-Level Customer Specific Journey Map. Once you are at this stage, it is good to have a short break and let it stew for a moment. Once you come back from the break, have a look at the map and adjust with any new details that came to your mind. Don't worry about the map not being perfect, just make sure it is good enough so you can all agree to it. If you had some customers with you forming the map, you can decide to move forward to next stages or you can do a validation for the journey with some other customers. Just be careful of "analysis paralysis", again it doesn't have to be perfect, because there will be many more chances updating the map.

Here is an example of a map with both Macro and Micro Customer Specific Journeys in their final documented form:



Picture 13. Example Macro and Micro Journeys

Once you are all happy with the map, it is time to move on to the next stage, which is the Customer Touchpoint mapping.

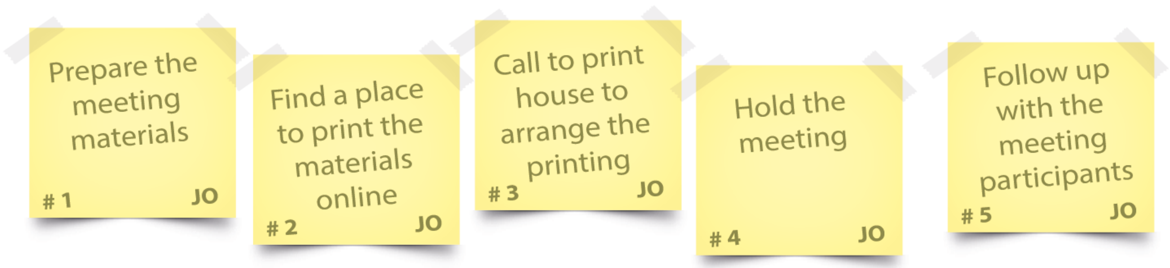
3.9 Case WWJD: Customer Journey Map

Let's go back to the WWJD case example, which was described in one of the previous chapters and make an example Customer Journey map for it. Remember that the example here is just one option and the final may look different when done by different people. That is normal since as discussed, no map is the territory so different people may create different representations of the journey. This is why Customer Journey mapping should be done together so that it becomes a consensus of how the group sees the journey. Before reading the map presented below, why don't you get some yellow sticky notes and make your own Customer Journey from the WWJD story? You can then compare your Journey Map to one below (and it very likely will be different; as it would be different to both your and my map if we did this together).

Example Customer Journey Steps for the WWJD case:

- Prepare the meeting materials
- Find a place to print the materials online
- Call to print house to arrange the printing
- Hold the meeting
- Follow up with the meeting participants

It is up to you what level of details you want to have on the Journey Steps. The more you have, the more you can optimise the Journey based on details. But having too much details will make the map harder to handle. So it is about finding the right balance. Below is a picture of the journey in sticky notes format. In this journey map the Steps are on high-level due to space restrictions of a page in a book.



Picture 14. Example Journey

How does your Journey Map look like for the WWJD? You can keep on building on your own map as we advance in this book.

4 Discover Customer Interactions

4.1 Introduction to Customer Interactions

Customer Interactions, also called Touchpoints, are typically the most used tool together with Customer Journey Steps. They represent any interaction the customer may have with the organisation. The name Touchpoint origins from describing any single point related to organisation or its products (e.g. user manual) being touched (i.e. interacted) by the customer. This involves any interactions the customer may have, whether that is with the people, physical or digital assets of the organisation.

What makes Customer Interactions really important is that these touchpoints are the way the organisation delivers value to customers. Touchpoints have the power to make or break the customer relationship. If the interaction goes as expected, then the customer relationship can be strengthened and taken forward to next Journey Steps in more positive tone. If the interaction goes badly, then depending on the level of mismatch between the customer's expectations and the reality, it may lead to deterioration or even to end of the relationship. Hank Brigman says, "82% of customers stop doing business with a company as a result of unsatisfactory or uncaring Touchpoints". This is why some of the Touchpoints are called Moments of Truth (MOT). We will discuss them in more detail later.

Any Customer Journey Step can have from zero to many Touchpoints. This is where the uniqueness of an organisation starts to show, because the same journey can describe delivered in different ways through the Touchpoints. Companies can realise Customer Journey Steps through optimising the Touchpoints. Some companies do it better than others. Some make it easier than others. This is where the competitive differentiation and advantage is created along the Customer Journey.

Let's take a practical example. Imagine a busy coffee shop. You come in to the shop and wait in queue for 10 minutes. For that time, you can savour the air, the smell of fresh baked cinnamon buns. You'll have time to gaze the beautiful red velvet cake and think about the tasty coffee you will soon get. Then your turn comes to order. The sales person is hasty and doesn't make you feel as welcome as the products she is selling. Then you wait in the pickup queue for your coffee to be prepared, after the ones before you. Now the barista won't say a word or acknowledge you in any way. Then once your coffee is ready, he almost throws it at the end of the pickup table, while quickly shouting out the name of the coffee '"Cappuccino!". And off you go. On your way a friendly cleaning lady wishes you a nice day and opens up the door for you since your hands are occupied with the coffee.

The previous short story contains a Customer Journey and many Customer Interactions. It contains even some Moments of Truth. Can you find them? We'll come back to your list later.

4.2 Identifying Customer Interactions

Customer Interactions are a widely documented area of Customer Journey Maps. There are various books you can read on them. For the sake of our purpose, which is to have a comprehensive Customer Journey Map, we can approach interactions fairly simply.

To identify all the relevant Touchpoints for each Journey Step, think about all the ways your customer is in touch or in interaction with the organisation. The level of details you need to go really depends on the journey and how deeply you want to understand the journey. Any obvious Touchpoints should be identified and documented with red sticky notes. The minimum information to record is the short and precise title for the interaction. Please note that each red sticky note should contain only one interaction.

Examples of bad customer interaction stickies would be:

- Customer presses the order button and receives a confirmation email
- Give the customer a mobile phone and get signature on the contract
- Customer parks the car and walks in to the restaurant

They are bad because they contain several different things. Good stickies would look something like:

- Customer presses the order button
- Customer receives a confirmation email
- Give the customer a mobile phone
- Get signature on the contract
- Customer parks the car
- Customer walks in to the restaurant

A challenge with Touchpoints can be that they can sound very similar to Journey Steps. The difference is that when a Journey Step describes how a customer travels from a desire to outcome, Touchpoints describe the individual interactions. Some of these interactions may even be Moments of Truth, which we'll discuss in the next chapter.

Let's go back to the coffee shop story in the previous chapter. Can you identify the Customer Interactions in it? If you happen to have some red sticky notes at hand, maybe you can even play around with them and map the interactions. Perhaps your list could look something like this:

- Coffee shop door
- Place for queueing
- Time for queueing
- Ordering the coffee from the sales person
- Paying for the coffee
- Place for waiting the coffee to be served
- Time for waiting the coffee to be served
- Watching the barista preparing the coffee
- Receiving the coffee from the barista
- Exiting the coffee shop

Here is an example picture of some of the Touchpoints described above:

Picture 15. Example Touchpoints

As you can see, there can be a lot of details in mapping out the interactions. The level of details you can use depends on the purpose of your map. In principle, the more details you have, the more you can micro optimise the journey. Some of the previous Touchpoints can be also Moments of Truth, so let's discuss them next.

4.3 Identifying Moments of Truth

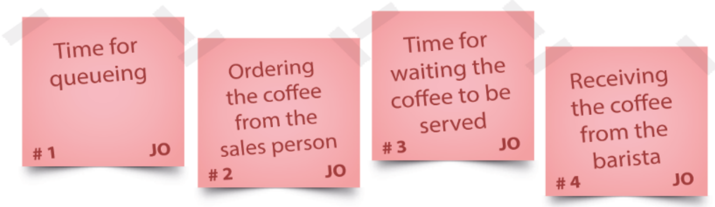
Moment of Truth (MOT), is a very important concept within Customer Journey and Touchpoint mapping. They mark those Touchpoints that are most important for the customers. Sometimes they may also be called drivers for customer satisfaction or loyalty. Now, how you identify the Moments of Truth will depend on which school of thought you want to follow. Sorry, this may get a little bit academic here. Let's discuss them first and then use our coffee shop story to highlight the differences.

One school of thought is "every customer interaction matters". In this case we would simply say that all the customer Touchpoints are MOT's and we need to treat them with the highest importance. The upside of this approach is that nothing gets missed, downside is that it may be more labour intensive in optimising. From the organisational perspective, this thinking will help us to optimise all Touchpoints, aiming for best efficiency. From customer perspective any Touchpoint can create either a Moment of Magic (MoMa), indifference (MoIn) or misery (MoMi), therefore being a MOT. Using this argument, we can state that all Touchpoints are Moments of Truth and therefore no separate analysis for finding MOT's is needed. We have utilised this approach in tens of cases successfully. It makes the Customer Journey Mapping method more straightforward. Going back to list of Moments of Truth in the coffee shop example, the list would look the same as the list of Touchpoints:

- Coffee shop door
- Place for queueing
- Time for queueing
- Ordering the coffee from the sales person
- Paying for the coffee
- Place for waiting the coffee to be served
- Time for waiting the coffee to be served
- Watching the barista preparing the coffee
- Receiving the coffee from the barista
- Exiting the coffee shop

Another school of thought is that "we need to use customer data to identify MOT's". Usually this is based on the assumption that customers know the best what is important for them. That may be true some of the time, but the challenge comes in getting that information from them reliably. The upside of this approach is that it is evidence based and will lessen the number of MOT's to focus on. This may be beneficial especially with long and cumbersome Customer Journeys. The downside is that it is laborious approach. To be able to know the MOT's, for example using a driver analysis, takes quite much data and analytical skills. The biggest mistake companies following this school of thought make is to ignore the Touchpoints that are not Moments of Truth. They are perceived as less important and therefore not optimised, which misses an opportunity to improve. Using the previous coffee shop example, let's assume that we have an existing Voice of Customer programme (VOCP) and we ask from customers how important each Touchpoint is. Then choosing the minimum importance level, we came to list of Moments of Truth in this imaginary case example to be:

- Time for queueing
- Ordering the coffee from the sales person
- Time for waiting the coffee to be served
- Receiving the coffee from the barista



Picture 16. Example Touchpoints

The third option is to do a hybrid of previous two. In this case the process would start with optimising all Touchpoints as Moments of Truth and then keeping on tracking them through a driver analysis. The benefit of this approach are both short-term and long-term optimisation. The first round of optimisation will give a road map to improve the touchpoints and then the second round will validate the drivers as well as help seeing whether they stay relevant to customers. Essentially not all Touchpoints will be equal along the journey, so this approach can be used to first optimise and then to understand how important each Touchpoint actually is to customers.

This book will not go into details of making a driver analysis to identify the Moments of Truth. That is because it could be a topic for a book of its own and will require advanced data analytical skills. This book will follow the first school of thought and handle all Touchpoints as Moments of Truth and therefore subject to optimisation.

4.4 Aligning Interactions to Customer Journey Map

Aligning Customer Interactions to Journey Map is fairly simple. Each step in the journey can be seen as swim lanes for the rest of the information that will be recorded in the map. Let's say you have a bank's Customer Journey Map with three steps in it:

1. Put money in
2. Wait for the money to grow interest
3. Take the money out with the interest

Picture 17. Example Journey

Each of the above journey form a swim lane for that step. We can then start mapping out Customer Interactions, Breakpoints and all the other information for each Step within swim lanes. Let's add some Customer Interactions in to the previous journey:

1. Put money in
   CI4) Bank teller
   CI5) Account T&C's
2. Wait for the money to grow interest
   CI6) Account balance sheet
3. Take the money out with the interest
   CI7) Account closing form
   CI8) The money in cash

Picture 18. Example Journey with Touchpoints

Each CI (Customer Interaction) under respective Journey Steps represent one Customer Interaction within that Step. You should read the picture above from left-to-right and top-to-bottom. Each Journey Step are like a column in a table with the necessary details below them.

4.5 Case WWJD: Customer Interactions Map

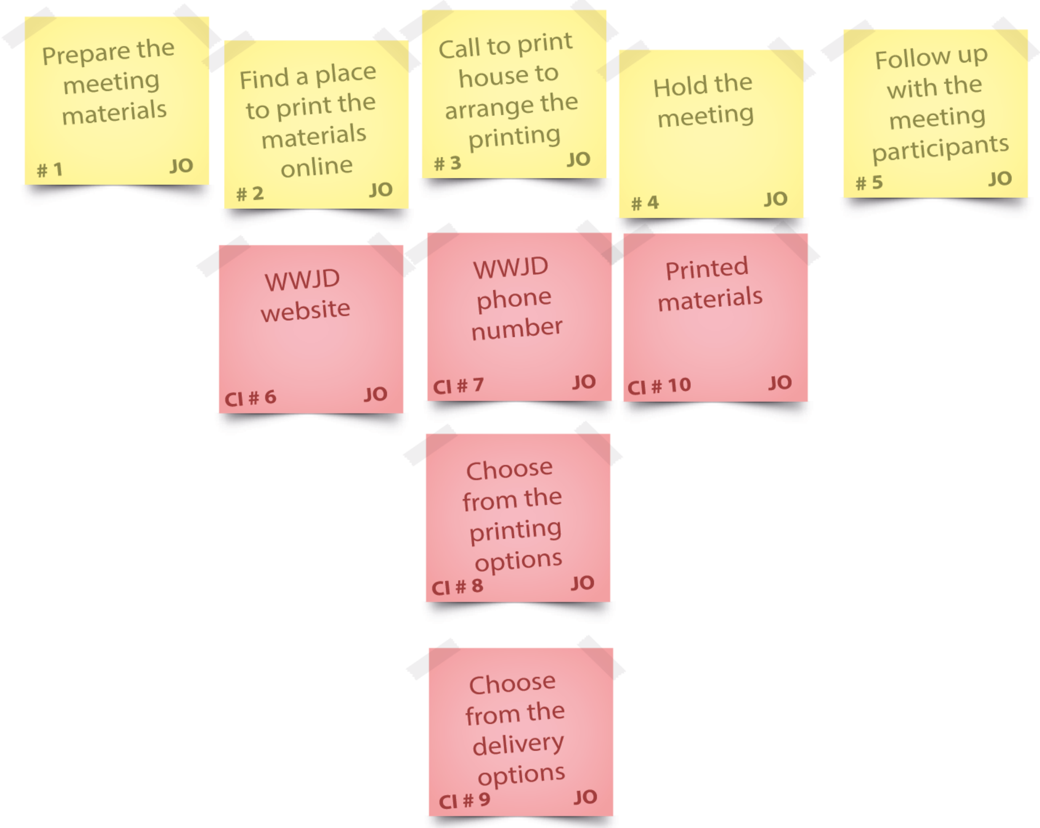
It is time to add Customer Interactions to our WWJD Journey Map. We'll be using the same Journey Steps as in the previous WWJD exercise. Before you look at the example answer below, map out the Touchpoints to your own WWJD exercise map first.

Here are the example Touchpoints:

1. Preparing the meeting materials
   - No Touchpoints
2. Find a place to print the materials online
   CI6) WWJD website
3. Call to print house to arrange the printing
   CI7) WWJD phone number
   CI8) Choose from the printing options
   CI9) Choose from the delivery options

4. Hold the meeting
   CI10) Printed materials
5. Follow up with the meeting participants
   - No Touchpoints

And in sticky notes format:



Picture 19. Example Journey with Touchpoints

As you see from the picture above, the first and the last Journey Step do not contain any Touchpoints. They could do if WWJD was to have any Touchpoints on those Steps. Due to limited space on this page, the details around picking up the printed materials have been omitted from this map. Your own exercise map will contain much more details for sure.

5 Breakpoints Along the Journey

5.1 Introduction to Breakpoints

Breakpoints have many names. They may be called also Internal Handovers or Employee Journeys. Two latter names are probably more self-explanatory so, let's start from the first name. Breakpoint reminds us of those things that can go wrong internally in the organisation. When people (or systems when it comes to that) are supposed to hand something over to someone else, for example to a colleague, things can go wrong. This is where Breakpoints have their origin. If organisation has business processes mapped out (or a desire to do that), then Breakpoints can be replaced with the process maps. Let's go through these different scenarios to see how they work.

Breakpoints are a human-centric way of understanding how Customer Experiences are produced along the Journey. Machine based interactions are better described through more technical process maps and that's why we mainly focus on the human aspects. Breakpoints occur in any situation where there is employee related interactions within the company. If the interaction involves customer, then it isn't a Breakpoint, but a Touchpoint. We'll go into more details on how Breakpoints are exactly identified in the next chapter.

Business process maps are another alternative way of looking at the internal workings. They are usually much more detailed than Breakpoint maps. If your organisation already has process maps available, then this is a great opportunity to align them in to Customer Journey. Doing that gives the benefit of first mapping and then optimising both internal (business) and external (customer) processes.

In the next few chapters, we'll go through the details of creating a Breakpoint map. Aligning business process maps will also be discussed shortly, however instructions on how to create a business process map are excluded from this book since there are many great books on that already.

5.2 Identifying Breakpoints

Identifying Breakpoints can be really fun. It brings visible all the work done behind the scenes for each Journey Step. We hear quite often in Customer Journey mapping workshops phrases like "I didn't know we do that!". And this only makes sense since most of the companies are organised in a tayloristic way (i.e. departments that don't genuinely co-operate, but work like factories, each focusing on their own task only). A lot of work is duplicated and unnecessary, but also hidden and unproductive. It is a bold claim, but our workshops generally produce 20–80% efficiency improvements, proofing the point. You can receive these results also by following the instructions from this book!

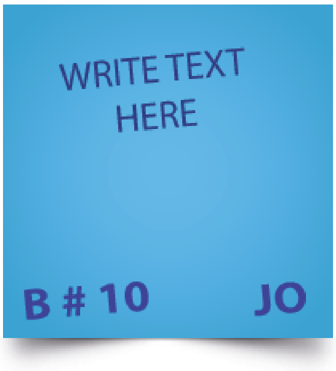
How can we get started then? Same way as with Customer Interactions, we will identify all relevant, internal handovers and work done for each Journey Step individually. We can ask questions like:

- Who are involved in this Journey Step?
- What is done behind the scenes?
- What is handed over between people and departments?
- What processes are related to this step?
- What needs to be done with tools, systems, etc.?
- What needs to be done with partners, suppliers, etc.?

Remember that if the work involves the customer, then it is a Touchpoint instead of a Breakpoint. Or if the work requires making a clear decision or choice, it is a Business Rule instead. Each Breakpoint is described with a blue sticky note. They should have a short and precise title, which clearly states the work or task. You can add more details later when documenting the breakpoints. Additional information could include:

- Longer description
- Risk level for the customer
- Risk level for the organisation
- Frequency/occurrence
- Owner

Here is an example of a Breakpoint sticky note (without additional information):



Picture 20. Example Breakpoint

5.3 Aligning Breakpoints to Customer Journey Map

Breakpoints are aligned to Customer Journey in very similar fashion as Interactions. First step is to identify the Breakpoints and then second is to map them under each Journey Step. For the sake of our purpose here, you will receive a lot of benefit from having each Breakpoint aligned to the Journey and optimised. Depending on the level of details required and the industry, a process flow type of mapping of Breakpoints may give more opportunities to understand the Employee Journey.

Let's use the previous simple example of a bank to map out the Breakpoints, too:

1. Put money in
   B4) Update the accounts
2. Wait for the money to grow interest
   B5) Invest the money
3. Take the money out with the interest
   B6) Handle the closing form
   B7) Count the cash

Here is an example picture of Breakpoints aligned to the Journey Steps:

Picture 21. Example Journey with Breakpoints

5.4 Aligning Business Processes to Customer Journey Map

As previously mentioned, aligning business processes and Customer Journeys together, may be very beneficial for optimising the organisation both from internal and external perspectives. Let's first shortly discuss what are business processes and how they differ from Customer Journeys. In my doctorate thesis (Ohtonen, Business Process Management Capabilities, 2015) it is shown that there is no one clear, widely accepted definition for business processes and their management. Typically, it refers to managing work from start to end with specific inputs and outputs from the environment. In this book we refer to processes as 'all the work done to create an outcome'. Internal processes mean all he internal work done to create successful customer outcomes. External processes mean the Customer Journey the customer has to take to achieve the desired outcome.

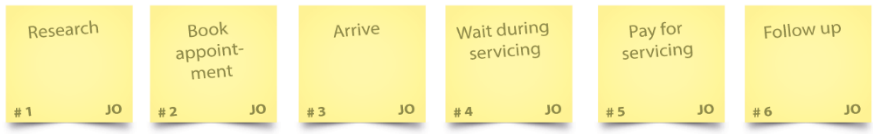
This may sound a bit scientific, but it is important for us to mean the same things. It will affect your success. Now that we know what business processes and Customer Journeys mean in this context, we can start aligning them together. Naturally, the first step is to have both a Customer Journey Map and a business process map available. If you are following the steps in this book, then you will have both available through the Journey and Breakpoint mapping exercises. In case you have already Journey Maps, but no process maps, then it makes sense to start with the Breakpoint mapping (it is much lighter approach than a proper business process mapping). In case you have process maps, but no Journey Maps, then you need to complete the Customer Journey mapping first.

Now that we have both process and Journey map available one way or another, we can start aligning them.

Step 1. Identify start and end points from both maps and see how well they match.

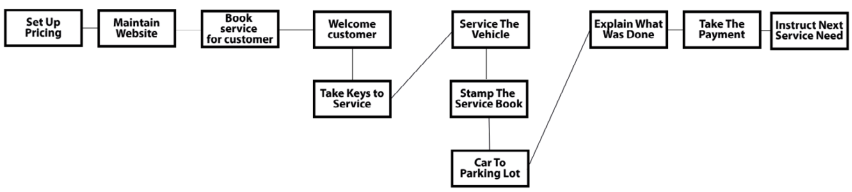
It is unlikely that the maps match perfectly, so you can have the Customer Journey Map as a master and then see how the process map fits in to that. Let's use a car service experience as an example. Below you can see the separate pictures for a Customer Journey and business process map that we need to align.

Customer Journey Steps:



Picture 22. Customer Journey Steps

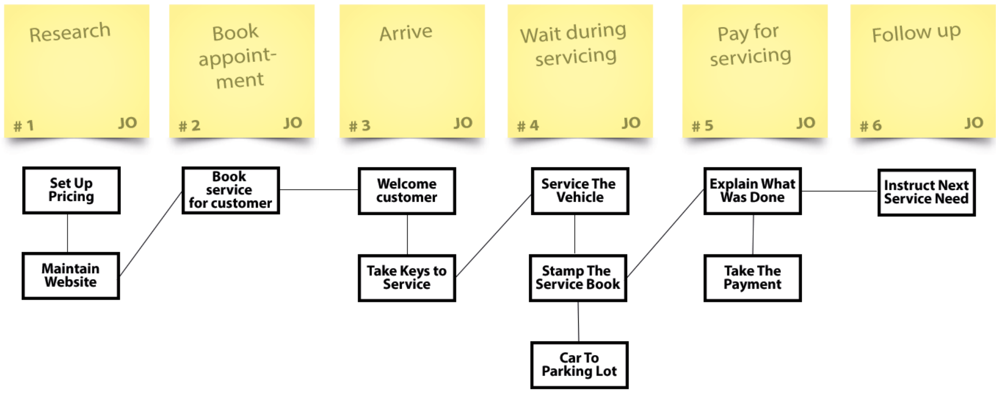
Business process map:



Picture 23. Business Process Map

Step 2. You probably need to dissect the process map into Customer Journey Step specific chunks.

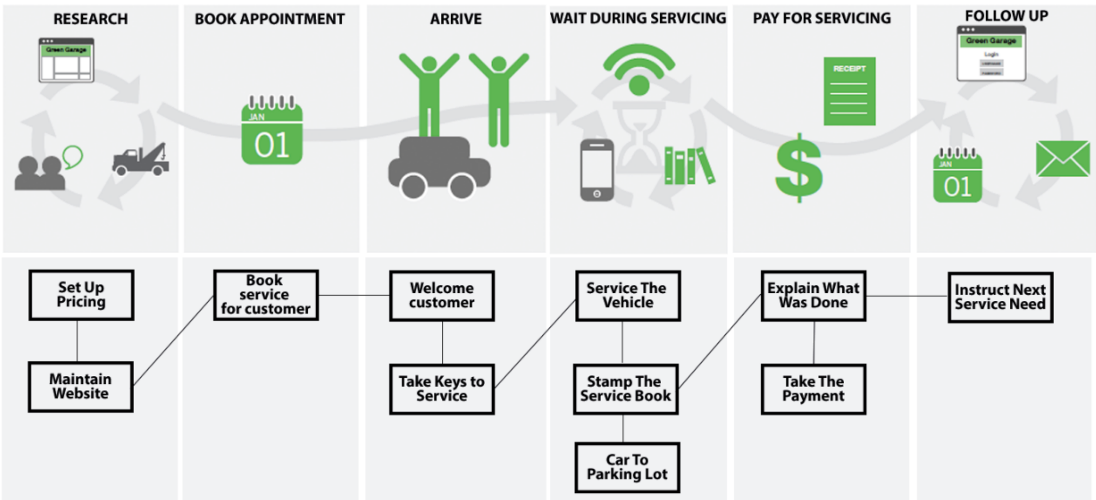
In other words, you align the process to Journey map one step at a time.



Picture 24. Journey with Process Steps

Step 3. Finalise the map and make it easy to read.

The example below shows how you can describe the Customer Journey with images instead of sticky notes. This could be done for the business process also.



Picture 25. Aligned Customer Journey

The final output can be used in various ways. It will give both, business and technical people a way into how the processes relate to Customer Journey. The map can also be used to optimise the processes by identifying the areas with development needs and alignment gaps (Journey Steps not addressed at all or too heavy-loaded Steps).

5.5 Case WWJD: Breakpoints Map

It is time to add Breakpoints to our WWJD Journey Map. We'll be using the same Journey Steps as in the previous WWJD exercise. Before you look at the example answer below, map out the Breakpoints to your own WWJD exercise map first.

Here are the example Breakpoints:

1. Preparing the meeting materials
    - No Breakpoints
2. Find a place to print the materials online

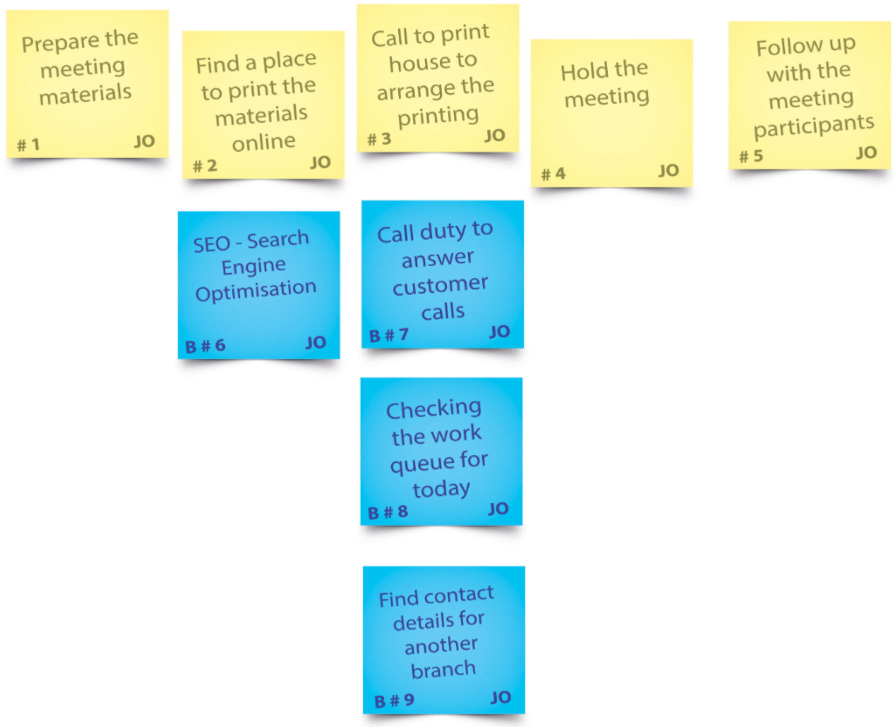
    B6) SEO – Search Engine Optimisation
3. Call to print house to arrange the printing

    B7) Call duty to answer customer calls

    B8) Checking the work queue for today

    B9) Find contact details for another branch
4. Hold the meeting
    - No Breakpoints
5. Follow up with the meeting participants
    - No Breakpoints

And in sticky notes format:



Picture 26. Example Journey with Breakpoints

As you can see from the picture above, this Customer Journey is quite heave related to calling to print house and arranging the materials to be printed. The same evident from the Touchpoint perspective also in the previous WWJD exercise. If you did model also the Journey Step on visiting the branch to pick up the materials, that is very likely to be heavy on Touchpoints and Breakpoints also. Since the WWJD is not involved in preparing the materials or giving out the presentation, there are no Breakpoints (though there are Touchpoints with the materials they produced).

6 Business Rules Shaping the Journey

6.1 Introduction to Business Rules

Business Rules, also called as Decision-making Points, are an interesting concept. What comes to your mind, when you think about them? Is it perhaps something boring? Or difficult? Many times that may be very true. It is also a fair challenge, what are business rules used for besides compliance, controlling and managing? Many times, not much. You probably have figured out by this far, customer related topics are not typically that bureaucratic, because we look at things from Outside-In, emphasising the customers in everything we do. This should be the case for Business Rules also.

What other, customer related, uses they could have then? One good option is to use Business Rules for ensuring a consistent customer experience across the organisation. This way the Rules will become more empowering than restricting. They can help us to become the Starbucks or the Macdonald's of our industry. It is easier for customers to engage with something that they can trust to perform over time. And it is easier for employees to deliver against clear expectations.

Another good use, more related to Business Rules mapping, is to optimise the rules. We are much more keen to add new rules than removing the old ones. Most organisations don't even know what Business Rules they have. In the past ten years, I have seen hundreds of rules being set, but at least I have never heard anyone to say, we need to get rid of some of our Business Rules (that is outside those people who have been exposed to our methods). Even in projects, where we mapped out rules for automation no one challenged the existing rules. One example of a consulting project where rules we hurting the business and the customer experience highlights this situation. An organisation had implemented an ERP solution using a SAP platform few years back. The challenge they had was a too long claim process, which took 18 days from claim to pay-out. This was too slow compared to market standard. The reason was relatively easy to find after the Business Rules exercise described in this book. There was eight days waiting time after the claim was recorded in the system and before it was processed. This was set as a rule in the system. It was very easy to fix by removing the rule (shortening the customer journey from 18 days to 10 immediately). However, more interesting part of the story is how that rule ended up in there. Can you guess the origin?

It goes almost hundred years back. All the way back to time when insurance claims were handled on paper and ink (no it was not some early version of an iPad, but proper ink that needed time to dry up). One day was used for the ink to dry properly. Then it took 7 days for a courier to take the documents from the branch to head office with horse and a carrier. Hence 8 days between the claim and the start of processing it. When in late 1970s computer processing started to come in, this same 8 days' delay was factored in. When the platform was renewed in 1980s and again in late 1990s, the rule was passed on. In 2012, when eligibly clever SAP consultants came in, they didn't add customer value through optimising the rules, but modelled them in as they were. And that is how close to hundred years old business rule lingered in the company until removed due to alignment between the Rules and the Customer Journey. What are your own stories on ridiculous rules that hinder creating remarkable customer experiences?

6.2 Identifying Business Rules

Identifying Business Rules have a little bit similar challenge in identifying them as Customer Interactions. What constitutes as a Rule? There are various fancy methods for Business Rules mapping, which is great, but most of them have an inside-out view, which isn't necessarily contributing on our customer agenda. Therefore, we will map the rules from customer perspective. For customers, the Rules are any decision points that shape the Journey. That could be through a choice or set limitations. Let's discuss few examples to clarify.

Business Rule can be a situation where a choice has to be made. Perhaps the customer can choose whether they want milk with their tea or not. Then they could choose what kind of milk they want (skimmed, semi-skimmed, soya). These are all rules that give the customer a choice. At the same time, they also set limitations, which make sense for business and for the customer. Having ten thousand different milks to choose from would be really expensive for the business to deliver. It could be very difficult for the customer also to choose from. So, not all rules are bad!

When we identify Business Rules, we can ask for each Journey Step, “What decisions, choices or limitations we have for this Step?” Then write down each individual Rule on to a green sticky note. The information you should record in minimum is a short and precise title for the Rule. Later when you document the Rules, you can add more information such as longer description.

Examples of bad Business Rules stickies would be:

- Selection of coffee beans and milk depending on the week day
- Coffee can be sold only to people who pay for it and take it away
- Price of the coffee depends on the size of the mug, type of coffee and any available discount

Why these are bad Rules? They have too many different things in one Rule. Good ones would read something like:

- Coffee beans available depends on the week day
- Milk available depends on the week day
- Coffee is given out only against payment
- Coffee is sold only as a take away

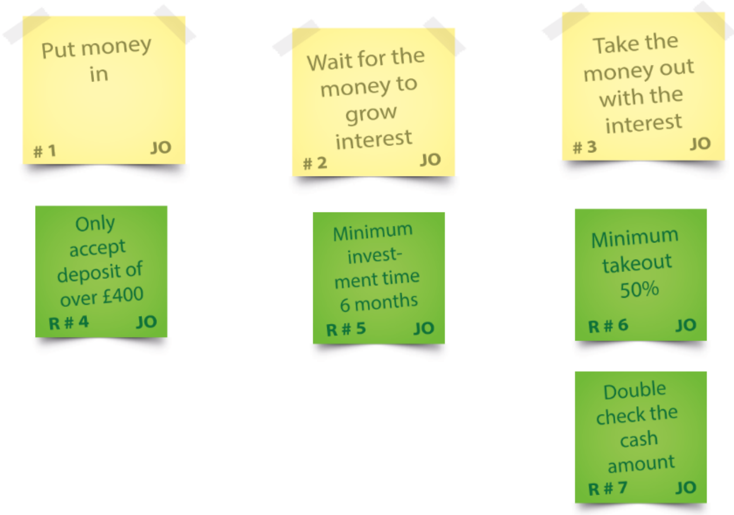
It is useful to keep in mind that we don't judge or evaluate these Rules at this point, we just document them. The goal is to have each individual Business Rule on the map for each of the Journey Steps.

Picture 27. Example Business Rule

6.3 Aligning Business Rules to Customer Journey Map

Business Rules are aligned to Customer Journey in very similar way than other additional information for each Journey Step. Following the instructions from the previous chapter, your team can identify the Rules for each Journey Step individually. Whether you want to continue the same approach as with Journey Steps and first write the relevant Rules individually and then form the complete picture together is up to you. When making that decision you should consider the available time whether the individual members of the team will enough different information. Usually this exercise is best done together.

If the organisation has already Business Rules identified, then it is possible to use that information as a basis. It will give interesting information how many of those Rules fit the Customer Journey and how many not. While mapping out the Rules one way or another, it is again important not to judge the Rules since at this part of the process we are just mapping them.



Picture 28. Journey with Business Rules

As the picture above shows, we map each Rule under specific Journey Step. This way we can see the Journey Steps that have more Rules impacting them. The previous advice is easy to apply in situations, where you are mapping around existing journey and business. If the goal is to create new journey and business around it, then the questions are little bit different. In that case our question would be "What is the minimum viable set of rules we need to have in place to ensure consistent customer experience?". This question will come handy also when we optimise existing Journey Maps.

At the end of this Business Rules mapping exercise, you should have a Customer Journey with all the relevant Business Rules identified for each step.

6.4 Case WWJD: Business Rules Map

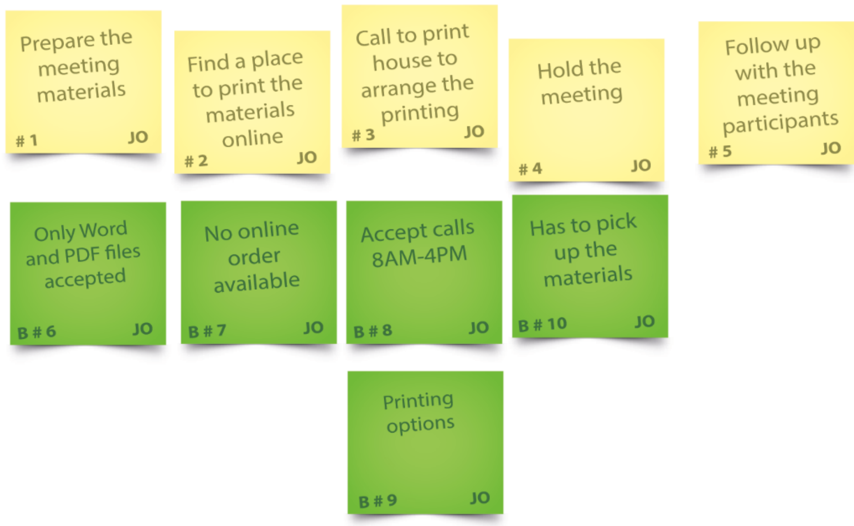
Let's continue adding details to our WWJD Journey Map, this time with Business Rules. We'll be using the same Journey Steps as in the previous WWJD exercises. Before you look at the example answer below, map out the Business Rules to your own WWJD exercise map first.

Here are example Business Rules:

1. Preparing the meeting materials
   R6) Only Word and PDF files accepted
2. Find a place to print the materials online
   R7) No online order available
3. Call to print house to arrange the printing
   R8) Accept calls 8AM–4PM
   R9) Printing options

4. Hold the meeting
   R10) Has to pick up the materials
5. Follow up with the meeting participants
   - No Business Rules

And in sticky notes format:



Picture 29. Example Journey with Breakpoints

7 Details Around the Journey

7.1 Mapping Systems and Tools

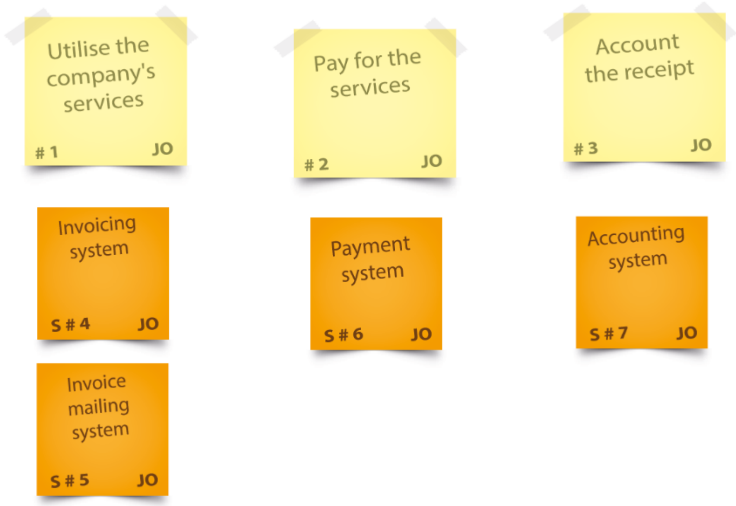
Adding Systems and Tools into Customer Journey Map is done in very similar fashion as other information discussed before. You can use orange sticky notes to record a title and a unique ID number for each System and Tool that are relevant for the Customer Journey.

In our context, a System means a set of principles or procedures according to which the Customer Journey is realised; it is an organised scheme or method. This can also include any Information Technology (IT). Typically, in modern information age each Customer Journey tends to have several relevant systems such as invoicing, booking, etc. We include also any tools, which means devices, especially ones held in the hand, used to carry out a particular function along the Customer Journey. This could include for example power tools on home building or nail polisher in beauty business.

In one real-world case, where we were mapping out a Customer Journey related to invoicing, it was identified that four different systems were used during that short journey. Using the information from the Customer Journey Map, it was clear that the company would benefit from optimising the systems. By mapping out Customer Journey, Interactions and Emotions, we can see how they relate to the systems that are used during the journey. For example, if the customer feels like they have been let down by the system, but the system or data says otherwise, who's right? Customer of course, because they have the power of making your systems obsolete (by taking their business elsewhere). The case company ended up combining two of the systems together and removing one to be able to improve Touchpoints and Emotions the systems generate. The ROI (Return On Investment) for the project was around £200k roughly 6 months later.

Here is a simplified, example version of a Journey Map with Systems and Tools mapped on it:

1) Utilise the company's services
   S4) Invoicing system
   S5) Invoice mailing system
2) Pay for the services
   S6) Payment system
3) Account the receipt
   S7) Accounting system



Picture 30. Example Journey with Systems

In this real-life case example, systems S4, S6 and S7 were combined into one new system. Mapping out the different systems for each Step made it visible, how much there was extra complexity in the Journey. This was doing both, causing expenses for the company as well as degrading customer experience. As it is already evident, Systems and Tools have a strong connection not only to Customer Interactions but also to Breakpoints. Therefore, mapping out Breakpoints can improve both, Customer and Employee Journeys.

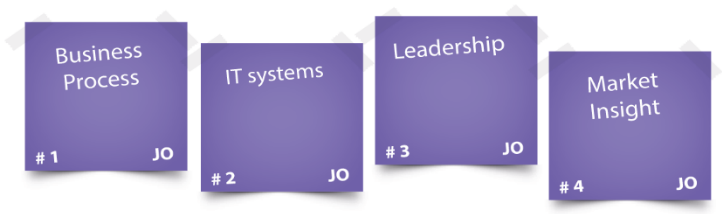
7.2 Mapping Resources and Capabilities

Resources and Capabilities are mapped in very similar fashion as other details on the Journey Map. You can use for example purple sticky notes to describe the Resources and Capabilities you want to map. Whether you need to do this at all depends on how Resource or Capability heavy your business is. Let's go briefly through, what we mean with both Resources and Capabilities in this context.

Resources are a stock or supply of money, materials, staff, and other assets that can be drawn on by a person or organisation in order to deliver the Customer Journey effectively. It is advisable to map Resources that are directly related to the Customer Journey. For example, in logistics business this could mean the forklifts and pallets used to move the customer goods around.

Picture 31. Resources

Capability is an expression or an articulation of a capacity, materials and expertise an organisation needs in order to perform the relevant functions along the Customer Journey. For example, in consulting business this could mean the people who perform the consulting activities as well as any special skills they may require.



Picture 32. Capabilities

The information to record for each Resource and Capability will highly depend on the business you are in. It makes sense to record different information about forklifts than you would about consultants. However, for the sake of our purpose here, it is enough to give each recorded sticky note a clear and precise title for what it is and then document any additional information to another document. Also giving a unique ID (for example a running number) may help to connect the stickies to any additional information elsewhere.

7.3 Mapping Stakeholders

Stakeholders are any persons who have an interest on the Customer Journey or parts of it. They could be employees related to Breakpoints, customers related to Touchpoints or for example a CEO who is interested in the financial results the journey produces. Whether you want to map the Stakeholders along the journey will depend on the purpose of the map. Also how you will use that information is important factor. If the purpose is to proactively manage stakeholders along the journey, including Stakeholder mapping will be highly useful.

The simplest way to map out the stakeholders is to choose a different colour sticky note for them. In this book we will use magenta. Then you just add one magenta sticky note per shareholder for each Customer Journey Step. Write the title or some other identifier for each of them. It is not recommended to add names of individual people, because they might leave the organisation or transfer to another journey, which would then cause need to update the map. Also some roles may need to be involved with many Journey Steps, or even the whole journey. It is up to the team decide whether they will add only one sticky note covering all Steps or one sticky per Step. If the latter is done, when optimising the Journey, it is easier to question whether the role has to be involved in all those Steps.

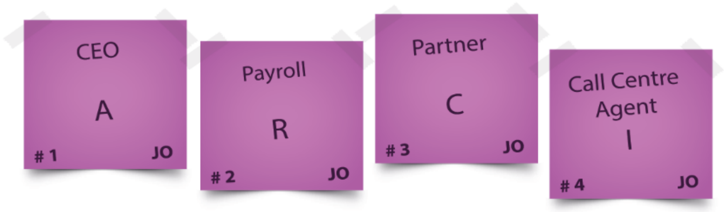
Picture 33. Stakeholders

It is possible to add more details on each Stakeholder sticky note. It could be useful to map their Emotions, for example. Using the same round green and red stickers as earlier, it is easy to indicate what each Stakeholder feels about each Step they are involved with.

Another, communication related, detail could be using the RACI method to indicate the type of communication the role has in that Step. The acronym RACI stands for the following letters:

- R – Responsible: Stakeholders who do the work to realise the Journey Step. This person or team has a responsibility for getting the work done or a decision made. This Stakeholder is connected to Breakpoints and Rules related to a specific Journey Step. Typically, one person or a team.
- A – Accountable: A Stakeholder who is accountable for the correct and thorough completion of a Journey Step. This usually is one person who approves work for whoever is Responsible.

- C – Consulted: These are Stakeholders who provide information for the work related to Journey Step and with whom there is two-way communication. This can involve several people or teams, often subject matter experts.
- I – Informed: These Stakeholders are kept informed about progress and with whom there is only one-way communication. These are Stakeholders who are affected by the outcome of the work (Breakpoints, Rules, etc.), so they need to be kept up-to-date with information.



Picture 34. Stakeholders with RACI

Other variations of RACI model are:

- RSI with the 'R' standing for Responsible, 'S' standing for Sponsor and 'I' standing for Informed.
- RACIS with the 'S' standing for 'Support'.
- RACIO with the 'O' standing for 'Out of the Loop' or 'Omitted'.
- RACI-VS with the 'V' standing for 'Verify' and the 'S' for 'Signatory'.

Do choose the variation of RACI (or any other communications model you prefer to use) based on what best fits the purpose of the Customer Journey Map.

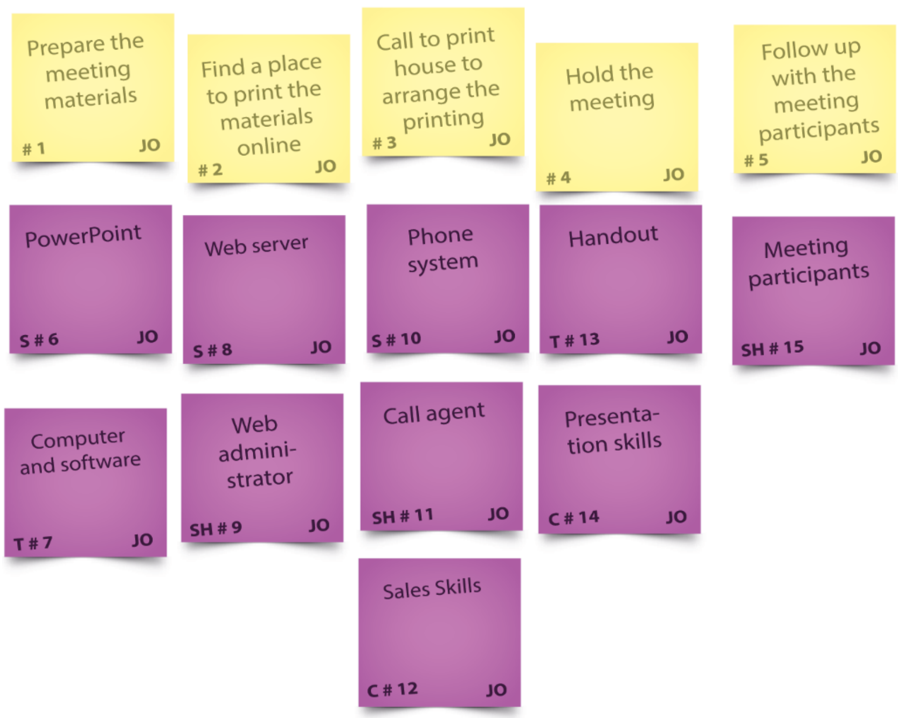
7.4 Case WWJD: Detail Map

Let's continue adding details to our WWJD Journey Map, this time with additional details we have discussed in this chapter. We'll be using the same Journey Steps as in the previous WWJD exercises. Before you look at the example answer below, map out the additional details to your own WWJD exercise map first.

Here are example details:

1. Preparing the meeting materials
   S6) PowerPoint
   T7) Computer and software
2. Find a place to print the materials online
   S8) Web server
   SH9) Web administrator
3. Call to print house to arrange the printing
   S10) Phone system
   SH11) Call agent
   C12) Sales Skills
4. Hold the meeting
   T13) Hand-out
   C14) Presentation skills
5. Follow up with the meeting participants
   SH15) Meeting participants

And in sticky notes format:



Picture 35. Journey with Details

8 Emotional Impact of the Journey

8.1 Introduction to Customer Emotions

When is the last time you had a discussion with your colleagues on how something that you are working on might make the customers feel? I would be surprised if that was any time soon. Looking at the business world, it almost seems like emotions are banned as a discussion topic. Or maybe they just don't interest enough? It could be that most of the leaders focus so much on hard numbers and forget that people are emotional and customers will judge the company based on their emotions elicited through the journey. Why questions such as how much something costs gets so much focus, while a question of how does it make customers feel is forgotten? Some statistics show that people make their purchase decisions up to 80% based on emotions. So why most of the focus is put to that 20% then?

Emotions are a critical component for successful end-to-end Customer Journeys. Sure, they are hard to fit into KPI spreadsheets, but they can cause big problems with customers, if not managed properly. The biggest benefits will come from repeat business, customer loyalty and better retention rates. This is because the emotions can either drive or destroy the value within the Customer Journey (as Colin Shaw has said). Any emotions that destroy value in the journey will take the customer further away from the organisation. Positive emotions will enable the journey to continue. Most positive emotions can turn the customer to become a promoter for the business and get others involved too.

Let's take Apple as an example. Is it really because they offer the best computers with the most affordable prices for consumers that so many buy them? If the decision was based only on logic, then this would have to be true. However, we all know that there are many PC's out there that are technically much more capable. We also know that they are more affordable. So, why buy Apple computers then? Because of emotions. It makes us feel as part of something. It gives us the feeling of purchasing "the best" though based on technical specifications that wouldn't be true. The more hard-core fan of an Apple someone is, the more emotional the decision has to be. Personally I like Apple, because their products make me feel that I won't need to do so much operating system maintenance as with Windows. Looking at the number of updates and problems related to Bootcamp and many other things that may not be logically true.

Another great example, if not one of the best, are movies. If logic would determine whether people buy movies, the only movies that would be sold are documentaries and non-fiction. Same would go with books and music. But as we know, that is not the case. Imaginary movies, books and music sell more than well. And that is because they can make people feel many things. They elicit emotions.

Why do then try to do all the business decisions with logic when emotions impact the business anyway? Why not just admit that the emotions are part of business and use them as one tool to create more value for customers? It may be because people are used to run businesses mainly based on numbers, logic and analysis. And there's nothing wrong with that. We should use the previously mentioned approaches on using customer emotions too as one of the ways we can add value. We can't afford stepping in to the trap of heartless numbers only and ignore emotions completely! World has changed too much, which is why we include Emotions mapping as part of Customer Journey. We know that successful emotional engagement with our customers will lead to better business.

Great example of this is from a hotel who has a sign under the bed that says "Yes, we clean here, too!". Another story from that hotel shows in a practical way, how they want to elicit emotions (and fantastic marketing stories): A young boy lost his long-time sleeping friend, a teddy bear, while on a trip to the hotel. The parents called in to the hotel reception to ask whether the cleaning staff has found it. Luckily it had been found. Instead of doing what most hotels would do and just mail the teddy bear back to the parents, they decided to do something different. They made a story about teddy bear's extra sleepover at the hotel. They quickly created a photo album with pictures of the teddy bear relaxing by the pool, sunbathing on the beach, and heading out in a golf car to play mini golf. Finally, the teddy bear and the photo album telling the story were sent back to the young boy. Can you imagine the amount of emotions this has created? And consequently made them more loyal customers, probably they also ended up telling the story to many friends and in several books.

8.2 Identifying Emotions in a Customer Journey

As discussed earlier, there are many ways to identify customer emotions from simple to very complex level. For our purpose of optimising Customer Journeys, we won't need a doctorate in psychology; much simpler approach will already give great results.

We can start from identifying both positive and negative Emotions along the Journey and name them. This will give us an Emotional map. You may ask why don't we also identify neutral Emotions? And you can! What we have found in our workshops is that neutral Emotions don't impact the Customer Journey as much as strong Emotions (whether positive or negative).

You are certainly familiar with negativity and negative people, since they are all around us. However, that is not what we are focusing here. We want to identify any negative emotions or thoughts specifically related to the journey (or a detail around the journey such as Breakpoint). These negative emotions destroy the customer value and experience. They will cause business to lose money, because the customers will stop doing business with it. Think about a situation when you were really angry because of some company and the way you were served. What happened? Why did you feel so irritated? Was it something that went wrong accidentally or perhaps something they did systematically? Let's take few examples. I was once really disappointed when I took my shirt to a dry cleaner. I got it back clean, but it was missing two buttons. Losing one would have been still manageable situation since there is one spare button sown in to the shirt. But two buttons missing means I will have one button missing after replacing the other. The dry cleaners denied any responsibility. I claim it is a systematic issue, caused by their machine. They won't get any business from me anymore. By the way, did you start feeling a bit irritated by thinking about your story and reading mine? Negativity catches like a disease. Do you want it to spread within your client base?

Here is an example list of potential negative emotions the customers may go through along the journey (feel free to add more, there are hundreds of them):

Annoyed, Angry, Anxious, Ashamed, Bored, Confused, Deceived, Disappointed, Discouraged, Disgust, Drained, Embarrassed, Exhausted, Fearful, Frustration, Grief, Helpless, Hopeless, Humiliated, Impatient, Inadequate, Inferior, Insecure, Intimidated, Hate, Overwhelmed, Pressure, Rage, Rejected, Buyer's Remorse, Resentment, Trust, Uncertain, Unfulfilled, Unmotivated, Unsatisfied, Vulnerable, Worthless, Worried

Positive emotions are very different because they create value and make people happy. Enough positivity will make sure the customers give repeat business and increases their satisfaction. Actually, when the customers become positive towards your business, it leads to all the way turning into a promoter! Let's test this again. Think about a situation when a company made you feel almost euphoria. What positive emotions did you feel? Why were they so strong? How long did that feeling last? Or is it still going on? Concentrate on your story, pause the reading for a moment and really dwell in the situation. How does it make you feel? I bet great again, if you actually did it…

Here is an example list of potential positive emotions the customers may go through along the journey (feel free to add more, there are plenty of these too):

Abundant, Attractive, Awe, Comfortable, Compassion, Confident, Connected, Contentment, Ecstasy, Enthusiasm, Euphoria, Energised, Entertained, Excited, Freedom, Fulfilled, Grateful, Happy, Harmony, Hopeful, Inspired, Interested, Joy, Love, Motivated, Optimistic, Passionate, Peaceful, Powerful, Productive, Proud, Relaxed, Safety, Satisfied, Serenity, Strong, Successful

How do you identify the emotions then? Technically speaking by having red and green round stickies with the emotions written on them. In some cases, you will find that very easy and in others difficult. We will discuss this in the next chapter.

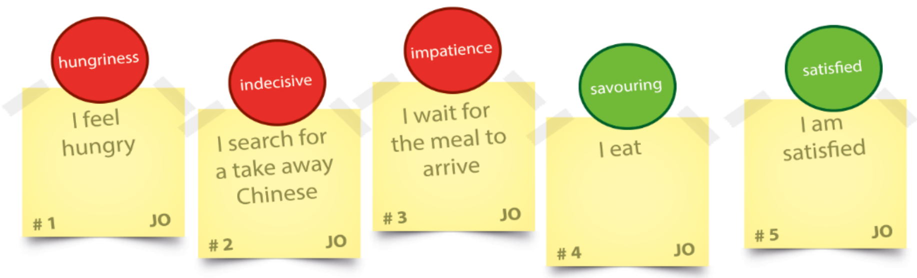
8.3 Aligning Customer Emotions to Journey

Let's get started with the simple things. You can map the emotions same way as other information, but with one difference. This time you align each emotion to a specific detail in the customer journey. So you can attach the emotion stickies on to any Journey Step, Customer Interaction, Breakpoint, Stakeholder and so on. You don't have to, but you can, if it makes sense. This is a great way of bringing emotional colour to your map. Simply take the round red and green stickies with the name of the emotion written on them and place them on to the journey and the details. You should do this as last step of mapping so that you can then place these emotions on all details of the map. Start from the journey and work forward from there. In minimum do the Journey Steps and Interactions and then rest if suitable.

For example, for Customer Journey Steps we could attach emotions like this:

1. I feel hungry: negative emotion of hungriness
2. I search for a take away Chinese: negative emotion of indecisive
3. I wait for the meal to arrive: negative emotion of impatience
4. I eat: positive emotions of savouring
5. I am satisfied: positive emotion of satisfied

And same in sticky notes format:



Picture 36. Journey with Emotions

At this point you will notice that some of the Steps may not have any emotions related to them, and that's OK. You may also notice that some Steps will have several emotions (even opposite) attached to them. That's all human life. We can be happy and cry at the same time. Or say "go away" and still feel love. That is what makes us so complicated and unique.

How do you find the Emotions for each Customer Interaction then? Are you just supposed to know them? We'll actually yes, sort of. Everyone involved in the mapping have to put themselves into customer shoes and try to feel the feelings the customer would. Sure it is not 100% accurate, feelings never are. But it will give you a rough Emotional map you can start working with. Which parts of the journey cause a lot of positive or negative emotions? Which won't move customers emotionally? It is all great insight. If needed ask customers to come in to the mapping workshop and tell about their feelings.

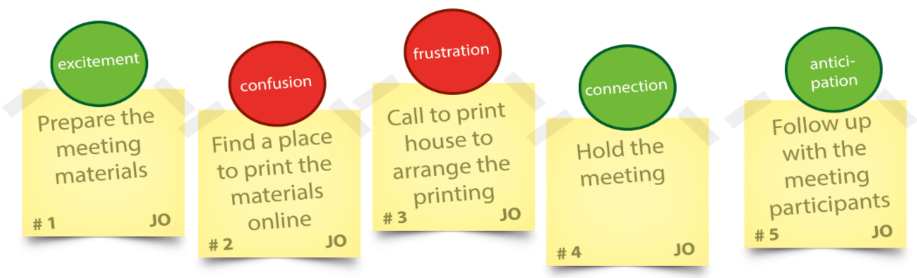
8.4 Case WWJD: Emotional Map

Let's continue adding details to our WWJD Journey Map, this time with Customer Emotions. We'll be using the same Journey Steps as in the previous WWJD exercises. Before you look at the example answer below, map out the Emotions to your own WWJD exercise map first.

Example Customer Emotions for the WWJD case:

- Prepare the meeting materials: positive feeling of excitement
- Find a place to print the materials online: negative feeling of confusion
- Call to print house to arrange the printing: negative feeling of frustration
- Hold the meeting: positive feeling of connection
- Follow up with the meeting participants: positive feeling of anticipation

Same in sticky notes format:



Picture 37. Journey with Emotions

Please do note that some of the Steps (or any other details on the map) could potentially have several emotions. Though we could come up with a long list of potential emotions, it is best to stick with the main or most common ones.

9 Facilitating Customer Journey Mapping Workshops

9.1 Introduction to Workshops

Customer Journey Mapping workshops are exciting events with the purpose of capturing a Customer Journey on to a map. Though these maps are useful tools for conveying the information within the organisation, the workshops have their own meaning also. Typically, the people participating the workshops will have the best understanding of how the journey unfolds from beginning to the end. This is also why it is beneficial to have the person who will prepare the final documentation in the workshop.

Evidently, planning a great Customer Journey Mapping workshop is a lot of work. If you spend time thinking through the details, everyone will get best value from the session. The workshop's goal to produce deeper understanding of a Customer Journey should be at the centre of all your planning. The workshop contains engaging and creative exercises, which will get everyone involved if facilitated correctly.

For the workshop to be successful, it needs a facilitator. Workshop facilitation is about helping the group to do the mapping. Facilitation is not really about being in charge of the session. Actually you do not even need to be an expert in the industry or the business the mapping is done for (although it can often help). The key to good workshop facilitation is that the facilitator and the participants are equals, sharing the responsibility to create a great learning experience. The facilitator needs to know the Customer Journey Mapping method presented in this book like his/her own pockets. The facilitator also needs skills to help the participants to think outside the box. For this reason, the facilitator should be in the role of facilitation rather than subject matter expert.

Some success factors for Customer Journey Mapping workshop are:

- Relevant, cross-team participants
- Positive and open communication without judgement
- Creating a common understanding of the journey
- Focus on the outcome rather than the outputs
- Commitment to improvement and action

Following the instructions presented in this book and practicing will ensure Successful Customer Journey mapping workshops.

9.2 Who Should Participate

Besides being adept in Customer Journey Mapping approach and preparing properly for the workshop, a right selection of cross-functional participants is key for success. One side of the coin is that they represent different, relevant teams across the journey and another side is that they are right kind of participants in terms of personalities. Also no one team or department should be over represented in the workshop by the number of people (unless that is beneficial in your unique situation).

The hardest part is to identify the relevant people to participate. It will help to think about the Customer Journey from end-to-end and all the various teams along the journey. Usually various business units and front line teams are easy to identify. However, we should not forget the teams who are working in the back office (doing non-customer facing work) either. They are often more educated on the Breakpoints and Business Rules than front line is.

As an example, people from the following teams could be good candidates for an in-store Customer Journey mapping:

- Store Manager
- Marketing Manager
- Retail Coordinator

- HR Manager
- Finances Manager
- IT Manager
- Call-centre Manager
- Inventory Controller

The main thing is to aim to represent all the relevant teams for an end-to-end Customer Journey. Second point is to have right kind of personalities in the room. It should be a fine balance of people who can clearly voice out their thoughts, but who will let others speak also. Thinking out loud is big part of these workshops and people should be comfortable with it. Also having a healthy sense of thinking outside the box, but without criticising others is important. The final Journey map should be a consensus of knowledge and thought represented in the room. Workshops are not a great place for extreme behaviours such as overly silent or talkative though it is part of the facilitator's job to to balance the discussions between all the participants.

9.3 Agenda for The Workshop

An important part for Customer Journey Mapping workshops to succeed is having a well-planned agenda. It is very easy to get misdirected or miss the objective for the workshop, if the facilitator doesn't keep track of time and what needs to be achieved.

The agenda for a workshop will depend on various variables such as available time, number of participants and the scope of the map (bigger map takes more time). Also need to focus on some areas of the map more than others is something to consider. If the Journey Steps are already mapped, then there is more time available for Interactions mapping for example. When making a map first time for any Journey, it is best to focus on Journey Steps and Interactions before moving into other details.

One more important thing to consider with the agenda is, how familiar with Customer Journey Mapping the participants are. If they haven't read this book nor participated these workshops before, the facilitator has to get them on the same page first. This usually is achieved best by giving the instructions to participants and completing them one step at a time.

Here are some example agendas that can be modified to your needs:

1-hour lunch and learn

This is an informational session with the purpose of increasing awareness around Customer Journey mapping. It needs to be tailored for the audience and the purpose of the session. Typically, it contains short introduction, benefits and approach to mapping. Then it calls for action (which could be one of the other session types introduced in this chapter).

2 hours' workshop

- Welcome, introductions, objectives and agenda – 20 minutes (mins)
- Instructions for mapping customer steps – 10 mins
- Writing the journey steps individually – 10 mins
- Mapping the customer journey together – 20 mins
- Instructions for mapping customer interactions – 10 mins
- Mapping the customer interactions together – 20 mins
- Validating the journey map together – 10 mins
- Agreeing on the next actions – 10 mins
- Questions, wrap-up and conclusions – 10 mins

Naturally you can replace both journey steps and interactions mapping in the agenda with other components to map if you already have done them.

Half-day workshop

- Welcome, introductions, objectives and agenda – 20 minutes (mins)
- Instructions for mapping customer steps – 10 mins
- Writing the journey steps individually – 10 mins
- Mapping the customer journey together – 20 mins

- Instructions for mapping customer interactions – 10 mins
- Mapping the customer interactions together – 20 mins
- Instructions for mapping customer emotions – 10 mins
- Mapping the customer emotions together – 20 mins
- Coffee break – 15 mins
- Instructions for mapping breakpoints – 10 mins
- Mapping the breakpoints together – 20 mins
- Instructions for mapping business rules – 10 mins
- Mapping the business rules together – 20 mins
- Instructions for mapping other information – 10 mins
- Mapping the other information together or in small groups – 20 mins
- Validating the journey map together – 10 mins
- Agreeing on the next actions – 10 mins
- Questions, wrap-up and conclusions – 10 mins

As you can see from the agenda, these shorter workshops require sharp focus and great timekeeping. Again it is possible to focus on fewer things and give more time to map them.

Full-day workshop

- Welcome, introductions, objectives and agenda – 20 minutes (mins)
- Instructions for mapping customer steps – 15 mins
- Writing the journey steps individually – 10 mins
- Mapping the customer journey together – 30 mins
- Instructions for mapping customer interactions – 15 mins
- Mapping the customer interactions together – 40 mins
- Coffee break – 15 mins
- Instructions for mapping customer emotions – 15 mins
- Mapping the customer emotions together – 30 mins
- Instructions for mapping breakpoints – 15 mins
- Mapping the breakpoints together – 40 mins
- Lunch break – 60 mins
- Instructions for mapping business rules – 15 mins
- Mapping the business rules together – 30 mins
- Instructions for mapping other information – 20 mins
- Mapping the other information together or in small groups – 40 mins
- Coffee break – 15 mins
- Validating the journey map together – 15 mins
- Agreeing on the next actions – 15 mins
- Questions, wrap-up and conclusions – 10 mins

Typically, the full day workshop is the most optimal timescale for mapping out an end-to-end Customer Journey. It is possible to ask relevant people to come in for specific sessions only. Still it is advisable not to change all the people in any group or you will need to do the introductions, welcome, etc. again.

2 days' educational workshop

The longer workshops are usually highly tailored for specific needs. Most common way of using two days' workshops is to add educational information in to the session. When shorter workshops are more about getting the map done, longer ones have also the adjacent purpose of knowledge sharing. The role of the facilitator would be expanded to educator also (or alternatively another trainer is brought in). These persons need to be proficient both in facilitation and training Customer Journey Mapping method.

9.4 Logistics

Preparing properly for the workshop will ensure smooth running even when some things won't go as planned. Luckily in terms of logistics, Customer Journey Mapping workshops are quite light to conduct. We can divide the logistics in to two categories: what you need to bring and what you need to do.

What do you need to bring?

You pretty much can guess the first one: sticky notes! We have never run out of them. Then you need proper pending like Sharpies to write on the notes. Rest will pretty much sort itself out through great facilitation. Here's a complete list of things to bring to the workshop:

- Yellow sticky notes: 1 pack per participant
- Red sticky notes: 2 packs
- Blue sticky notes: 2 packs
- Green sticky notes: 2 packs
- Purple sticky notes: 2 packs
- Orange sticky notes: 2 packs
- Pink sticky notes: 2 packs
- Magenta sticky notes: 2 packs
- Red/amber/green small dots: 2 packs
- Sharpie or equivalent pens: 1 per participant and 5 extra ones
- Flip chart papers or electromagnetic whiteboard wallpaper: 2 packs
- Adhesive tape: 1 roll
- 1 Camera or a mobile phone with a camera
- Presentation PowerPoint for the Customer Journey Mapping process
- 1 Video projector and laptop, if electronic materials needed
- 1 hard copy with space for notes

What do you need to do?

Most important thing is to prepare for the facilitation. Make sure the facilitator is on top of the agenda, logistics and who will be in the room. Pack everything ready the day before so you have still time to pick up anything missing. Make sure the facilitator is on time and ready when a session is scheduled to start.

Other logistics

Make sure the agenda isn't fully packed. There should be enough room for introduction in the beginning and coffee breaks in the middle. Also lunch should be provided in full day sessions. Make sure people have refreshments and fresh water available at all times.

9.5 Participant Instructions

Preparing participating a Customer Journey Mapping workshop can start days before the actual session. This could include gathering useful documentation and information to use in the workshop. If possible, discussing with customers about their journeys can be useful. Also travel arrangements, accommodation and such will take a bit of time.

These workshops are professional events, so when it comes to rules, same ones will apply as in your work normally. Usually there is no need for many rules, but to respect others' opinions and to be open-minded. This is especially important in these workshops, because we are about to map journeys and details we are not familiar with or may not always agree with. Challenging other participants is OK, but it should be done only in constructive manner, with the purpose of creating a better map.

Participants should come prepared both mentally and physically. Having a heavy pub night or drinking the night before is not a good idea. These workshops require a lot of energy, so sleeping well and having a proper breakfast is important. Also during the session, it is highly recommended to drink plenty of water. Some research suggests that dehydration can block brains from functioning in full capacity.

Mobile phones and computers are quite disruptive in many events today. These workshops require active participation and listening to others in order provoke own thinking. For this reason, it is best to arrange the time reserved for the workshop just for that. It will impact the level of contribution you can give, if emails or calls are forcing your brains to context switching.

In general, these sessions tend to be simple, but challenging events. They mainly require high energy, positive thinking and loads of customer empathy. Don't worry about it too much, just go with the flow and the prize in the mind.

9.6 Session Rules

This chapter is designed to help you plan your workshops. We are not in favour of any rigid approaches to running workshops. In most of the cases you don't even have to read this specific chapter. However, if you feel like having some ground rules in place would help to run the workshop, feel free to come up with your own rules or choose some from the list here. Choose 3–5 session rules that you find most important for your target audience and communicate them before and in the beginning of the workshop.

Here is the list by Ellen Gottesdiener (Chapter 6 in Requirements by Collaboration, Addison-Wesley, 2002):

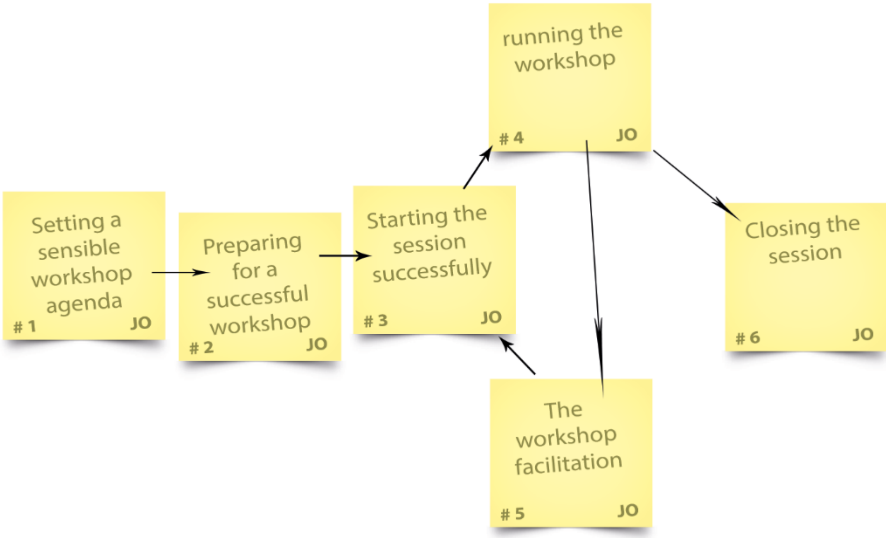
- Share all relevant information.
- Everyone's input is equally valued.
- Everyone must be on time throughout the workshop.
- Only one conversation will go on at once (unless subgroups are working on a topic).
- Respect each speaker: Don't take part in side conversations; listen and ask clarifying questions.
- Keep jargon to a minimum.
- Cut to the chase.
- The group is responsible for the deliverables.
- Signal when we are going off-track.

- Off-target discussions are limited to five minutes and then recorded as issues.
- Spend time on other issues only if the deliverables are completed and everyone agrees there is value in addressing the issue.
- Every issue identified in the workshop will have follow-up.
- Discussions and criticisms will focus on interests, not people.
- No idea is bad.
- All members are expected to participate in all phases of the process (if you leave the room, you are responsible for getting filled in and agree to support any group decision).
- Encourage other team members.
- Respect differences.
- Don't discount the ideas of others.
- Be supportive rather than judgmental.
- Share your experiences.
- No phone calls are allowed during the session.
- Use the parking lot for off-track topics.
- Critique or evaluate the session when asked.
- Support everyone's right to be heard.
- Keep phones and pagers on silent or vibrate mode during the session.
- Be open to new concepts and ideas.

This list is here just to give you ideas on potential session rules. Don't have too many rules, just pick the few of the most relevant ones for your target audience.

9.7 Facilitation Secrets and Guidelines

Simply put, the success of a workshop will depend on the success of the facilitation. If you are not familiar with facilitating workshops, we recommend taking a course on it to get practice. This book will only lay out basic introduction and tips for more experienced facilitators. The process picture below will give you an idea of the main components to manage for a workshop session.



Picture 38. Process for Workshop

Sensible agenda. Plan the workshop agenda as carefully as possible, including any alternative plans necessary. If the actual timing goes quicker than planned, what additional things you can do? If you start running late, how will you catch up and avoid running over time?

Preparing for a successful workshop. This Customer Journey Mapping workshop chapter has been written for you to have the key information for arranging successful workshops. After reading this chapter, you can plenty more advice in facilitating workshops from YouTube, Slides are and other sources.

Starting the session successfully. Beginning of the workshop is really important, because it will set the tone for the whole session as well as manage the energy level of the participants in the session. Here are some guidelines for ensuring a successful start for the Customer Journey Mapping workshop:

- Set up the venue so that everyone can take part and see each other. Ensure everyone can hear and contribute without hindrance. Check the sound levels if needed, though you should not need one anyway. These are small group sessions rather than mass events.
- Set the tone right from the moment people arrive. Welcome them friendly and help them feel comfortable. Break the ice right in the beginning by creating a casual environment.
- Have people introducing themselves. Explain who you are, what the objective of the workshop is and practical details about the venue (e.g. what to do if there is a fire, where the toilets are, where to get fresh water, etc.).
- Ask the group to set their own ground-rules for the workshop. This could include: respect others' opinions, be open-minded and one person talk at a time. You can suggest some other rules mentioned in this book too, but don't have too many rules.
- Get participants involved and interacting with each other as soon as possible. Give them a chance to relax and get to know each other in the beginning. Avoid any long, formal introductions and include fun introductory activities (e.g. ask what is the best customer experience they ever had). Remind that we are here to learn from each other.

The workshop facilitation. This is the part of process where people leading skills are needed. Success workshop will keep the participants focused on the task at hand. It will also be able to bring out all relevant information visible on the map, including tacit knowledge. The workshop facilitation will also require capturing that information for further use.

While running the workshop, the facilitator needs to be very sensitive to group dynamics. By following the advice here, it is likelier that you won't run in to problems while in the workshop. And that happens through proactive group dynamics management. Most rare, but important technique is to eliminate any dysfunctional behaviour. Sometimes this means having a short chat with someone specific during the break. Once we had to ask one person to leave in the middle of session since he took several calls while in the room. Building a consensus is very important also. In Journey Mapping there rarely is one right answer, so it is better to find answers that most can relate to. Finally, as mentioned few times already, big part of successful group dynamic is to be able to keep the energy high throughout the session. The facilitator has to be able to be sensitive for the people's energy levels at all time. Worst thing to happen would be that the facilitator runs out of energy! So make sure that the facilitator is able to add his/her own energy at any time. With right facilitators that's not a problem, they receive energy from running the workshop itself and being with the people.

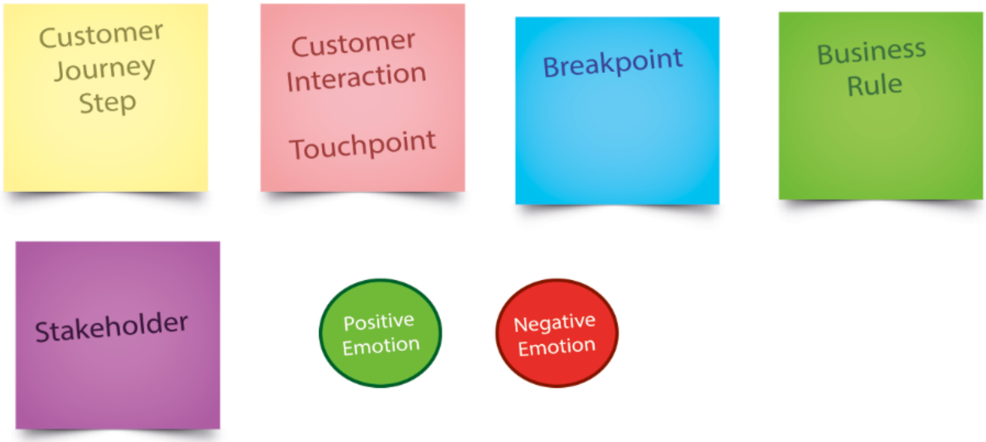
Closing the session. One would think that it doesn't take much to close a workshop session. But that is one of the great facilitator secrets to be able to do that effectively. It is a great opportunity for creating momentum for the next steps. Depending on the objectives and the appetite, it is possible to set up accountabilities for people. This is great time to get buy in for the upcoming change. You know that the workshop went well when people leave happy and full of enthusiasm to make things better.

9.8 About Sticky Notes

This may sound a bit funny, but it has to be said: the colour of the sticky notes doesn't really matter! It is only for the purpose of consistency in this book that we'll use the same colours for various things to avoid confusion. You can use any colour that you wish. For the sake of the clarity and easiness of documenting, it is highly recommended to use different colours for different matters (but you don't have to).

In this book we are using the following colours:

- Customer Journey Steps: yellow
- Customer Interactions/Moment of Truth: red
- Business Journey/Breakpoints: blue
- Business Rules and Decisions: green
- Systems and Tools: purple
- Resources and Capabilities: orange
- Emotional Journey: pink for details and red/amber/green small dots for emotion types
- Stakeholders: magenta



Picture 39. Sticky Notes

There are two kinds of sticky notes: normal and extra sticky. It is recommended to use the latter ones. Depending on the wall material you are putting the stickies up to, they may fall easily. Therefore, it is better to use always the extra sticky notes.

Size of the sticky notes is really a matter of taste and wall space available. We tend to use bigger yellow sticky notes for the journey steps, normal size for interactions, breakpoints and rules and then smaller ones for the rest of the information. Depending on the level of details you will go for the customer emotions, you may use small dots for emotion types (positive, neutral and negative).

The wall material for the stickies to be put on is important. Some wall materials (e.g. coarse, oily) will not hold the stickies. In most of the cases it is advisable either to cover the wall with flip chart papers or electromagnetic whiteboard paper to ensure no hindrance from falling sticky notes.

Pens that are used to write on the stickies are also important for documenting the results. It is advisable to use black marker which is thicker than a normal ballpoint pen but not too thick like whiteboard markers are for this purpose. When choosing the pens, take into consideration the documenting requirements and visibility of the text on the sticky notes in the workshop.

9.9 Follow Up After the Session

The Customer Journey Mapping workshop isn't really over once it has ended. Now we have the amazing maps done and it is key to keep the momentum up. There is still a way to go to change organisational culture from here. Let's discuss from two different perspectives about the follow up after the session: the participants and the organisation.

Let's start with the participants. First natural thing to do is to thank them for the contribution. And doesn't mean just a casual "thanks" for coming in, but a clear and short message on how their participation has helped the organisation to move forward with this key piece of work. Make it specific and real, showing that it wasn't just another workshop.

Next important matter to attend is sharing the outputs with the participants. This could be just sending the raw photos or cleaning up the documentation and sharing that. Hopefully you have already agreed in the workshop which platform and medium you will use to share the outputs amongst the team.

Then remind the participants about the next steps you agreed at the end of the workshop. Make it clear who was supposed to do what and by when. Offer help (if relevant) to hold them accountable. Remember to schedule in any new meetings you have agreed as part of the process.

Now that we have followed up the workshop participants, let's consider also the wider organisation (I.e. Those who weren't in the workshop). First thing to decide is when is the right time to communicate the outputs and in what format. There is no point reporting on a workshop that was held couple of months back. Depending on how long it will take to prepare the communications, you may need to give heads up and inform about the schedule when more will be shared.

It is important to start with explaining the context and the purpose of the Customer Journey Mapping effort. Others might not be aware why you are doing it and what the benefits are. Explain the road map from mapping to taking action and your current position in it and schedule for advancing.

Then present the outputs in short and clear format. It is unlikely that you need to share all the outputs from the workshop since that might be too much details. Report on the key findings and make a simple representation of the map that a Yong can understand. You could share just the Journey Steps and mention the numbers of details underneath with relevant narrative. Remember, others might not know what Touchpoints, etc. are.

As you keep the communications for the wider organisation short, you can give access to more details for those want to understand the details also. This could be simply a link to where rest of the information is. Also provide contact details to person responsible for the maps and workshop so anyone interested can connect to for further discussion. If people will not have access to enough information, it may lead to rumours and sharing false information.

These instructions here are here for giving you ideas on what kind of approaches are possible for following up after a workshop session. The most important thing is to do a follow up not to disappear into oblivion after the workshop has been concluded.

10 Communicating the Results

10.1 When Is a Customer Journey Map Ready?

This chapter is here for 'Frequently Asked Questions' reason. People get really involved with creating the Customer Journey Maps and they may end up having an 'analysis paralysis'. As we have already discussed, the map is not the territory. It is always a subjective snapshot of something what we hope to be as close to the territory as possible. Therefore, it is only sensible to ask, 'how much do you need to know to know that you know enough?' Begin with the end in mind and the mapping exercise will come to its natural end.

Another answer to this common question is that a Customer Journey Map is never really ready. It will require regular updating as the customer needs, competitive journeys, market conditions, new technology or anything else that has impact on the journey changes. The key points are 'fit for purpose' and taking action to improve.

You can read a story about a media company later in this book, which had hundreds of journeys mapped out without any actions coming out of it. What a waste. We have done tens of consulting cases where the focus is on a specific part of a Journey and the mapping can be conducted fairly easily. And that takes us to a real hurdle: implementation of the future (i.e. optimised) journey. That is where the most challenges will emerge. And this might mean that the organisation needs a Journey Map, implementing the future Journey in phased stages. Such efforts can make Journey Maps highly volatile.

10.2 Documenting The Customer Journey Map

Documenting the Customer Journey Map is an important post-workshop activity. It enables to keep the map on top of people's minds and to update it as the world changes. There is no single right way to document the Journey, so you need to find the way that best works for your organisation. As with everything, you need to start with the end in mind (if you are not familiar with that concept, search Simon Sinek from YouTube). How will the map be used? By whom? When? And what's the best way to communicate the workshop results to intended audience? Here are suggestions for various ways we have used to document our workshops for tens of organisations:

One possibility is to have a dedicated room or place for keeping the physical Journey Map available for employees to access. Upsides of this approach are that it is easier to modify the original map and it looks more "self-made". This can help to make a mental connection with the map easier and to talk around it with others (e.g. having meetings in the same room). One great example of this comes from one of our clients: they painted one wall in the company cafeteria with the blackboard wall paint and then used different coloured chalks to draw the Customer Journey map there. This caused the employees to discuss and think about the customer more often. Some other clients have dedicated walls from meeting rooms for this purpose. Some of them have hired professional graphics designers to create beautiful printouts, too.

By far the easiest and cheapest way is to take photos and share them via email. It is also the most unclear way to communicate the map. Still, I recommend taking photos from every workshop just in case something happens to the map. In one of our workshops the cleaning lady had cleared the wall between the two workshop days. So we started again on the second day. In another occasion the only camera that had the photos for later documenting was broken and the photos lost. For these reasons (and a bit of paranoia), we take photos with two different cameras nowadays, just in case.

Quite common way to document workshop outputs is to write the Journey into Word, Excel or PowerPoint (or their better equivalents). All of them have their pros and cons. The upside is that it doesn't require any special software, but the downsides are the limitations set by this software. Potentially Word is most preferred when the description texts for Journey Steps, Interactions, etc. are long. However, Word won't be able to show the map properly in a visual format. Therefore, using text documents as a supplement to actual map makes more sense. Excel enables more spreadsheet type of documenting, which is great for categorised and calculated information related to the map. Excel could be used to present financial figures, cost estimates, etc. for each Journey Step. This can greatly aid building a business case for improving the Journey. PowerPoint is great for focusing on specific details around the Journey Steps and Information. Perhaps you will have a meeting to discuss about Touchpoints and you could use PowerPoint to guide the conversation.

Best way to present the map itself may be with a modelling or graphics designing software (such as Vision or InDesign). In the hands of the right person, a great pile of sticky notes on the wall may turn in to stunning visual presentation. And believe me, it does matter. Having a visually engaging form of the map will inspire people to use the map. Quite many people are visually oriented and can process information better through pictures (thanks for decades of watching television). Potentially you will need several versions of the map for various purposes (executive e.g. executive, front line, back office and detailed versions).

It is perfectly OK to improve the map over time. Use whatever you can to get started and build more Customer Journey Map assets as you go along.

10.3 Sharing The Customer Journey Map

Sharing the Customer Journey Maps with others is pretty important. Though the process of creating the maps has value in itself, sharing the final outputs with a wider audience will help everyone in the organisation to align themselves to customer.

It is beneficial to have a company-wide centralised Customer Journey Map repository. This could be simply a folder in network drive with all the maps in it. It can also be a shared area within the company intranet. How the maps are documented may also affect the choice of sharing platform. It will be easier for wider audience to update the maps, if a standard software is used compared to specialised ones. Also it is worth the time to think about the process for updating. Can anyone update the maps or is there some kind of approval process?

Having roadshows in the organisation can help those people who have not been in the workshops to understand the maps better. This is also a great way of collecting more feedback on the maps to develop them even further. As you know well, just emailing the maps and asking for feedback will not have the same level of engagement.

10.4 Keeping The Map on Top of Mind

Customer Journey Mapping is not a one-off project; it is a process of continuous learning, value creation and improvement. This is why the maps should not be buried at a cupboard in the office or in the file sharing folder in the intranet. They need to be readily available and visible for all employees. The maps need to easily accessible in any meeting as needed.

It is fairly easy to get employees excited over the new maps when they come in. But the excitement will fade away quickly. If the mapping is done as a periodical exercise (to create new maps and to update the existing ones), it shouldn't be done once a year, always at the same time. This will lead mapping to be a tick-a-box exercise. Instead, the maps should be integrated as part of any planning, design and other activities that form how the organisation works. This will ensure that the maps are both used and updated regularly as they are connected to actual work.

It is best to discuss with your Customer Team, Internal Communications and Human Resources on what is the best way to keep the maps on top of mind in your unique situation. Perhaps this will include training the employees regularly on the maps. It could include writing blogs from cases where the maps are used to support decision-making. Some companies prefer to have the maps spread around the office walls and meeting rooms.

Keeping the maps on top of mind and embedding them in to organisational culture will require active management of activities to make this happen. There should be a responsible person who drives these actions. Also there should be a strategy on how the maps are connected to various parts of the organisation. It all takes a bit of effort, but is worth it.

And one more thing to consider is how to make the Customer Journey Maps alive. There is no reason to bore the employees to death with them. Have someone capable to make the maps inspiring looking. Create explainer videos that show the journey in action. Interview customers and experts who give relevant insight in to what to focus on.

10.5 Updating The Map

Any map is a snapshot of a current situation. The nature of Customer Journey Maps is such that it is impossible to keep the map always updated. And it is a subjective view anyway. However, conducting the mapping exercise as one off doesn't give the best benefits either. A media broadcasting company had started a project on Customer Journey mapping 2 years ago. They had mapped over 400 journeys and we're about 40% ready. They consulted us on what they should do with the project. We asked the question of how many of those journeys were still up to date? That was around 20%. Then we asked whether any tangible action had been taken based on the maps to improve business? The answer was no. Would you recommend continuing such project? Neither did we. So, the project was closed and a new one started. That project begun by defining the purpose for the mapping exercise, budget for taking action and a clear action oriented approach to change was adopted. Six months later the company had done new, less granular journey maps and generated cost savings close to £200k.

The frequency of updates on the map isn't any exact science though it is important. Updating the map every two years would be too slow in most of the journeys. Updating the map too often may be too expensive on the other hand. Also maturity and completeness of the map affect how often it makes sense to update it. In average, updating the map once year works quite well. Smaller updates can be made throughout the year as needed.

The organisation should have someone responsible for keeping the maps up to date. Many times collective responsibility will lead to no one taking the responsibility. That person can take coordinate the efforts to arrange any necessary workshops and updates. If the organisation has a customer experience team, then that would be a natural place for the responsibility. If not, then perhaps marketing.

10.6 Case WWJD: The Final Map

Here is the final Customer Journey Map for the WWJD case example we have been using in this book:

Picture 40. Example Journey Map

As you can see, the details for a Journey Map start to build up fairly quickly. Therefore, it is important to define what is the purpose of the map and then to limit the details on those that are useful for achieving that purpose.

11 Evaluating Customer Journeys

11.1 Financial Implications

Customer Journey Map doesn't only have financial implications, but it is the core of how the organisation makes money from taking customers from a desire to an outcome. Companies spend most of their time worrying about their own internal processes when customer processes are the ones where the value produced by the company will be consumed. You don't see that value often in yearly reports, do you? Here are some examples of financial implications Customer Journeys and Experiences are known to have:

- A 5% reduction in the customer defection rate can increase profits by 5 – 95% (Source: Bain & Company)
- A 50% reduction in customer base would occur if left alone over a 5-year period (Source: Bain & Company)
- It costs 6–7 times more to acquire a new customer than retain an existing one (Source: Bain & Company)
- An average company loses between 10–30% of its customers annually (Source: McKinsey)
- 55% of current marketing spend is on new customer acquisition and only 12% of current marketing spend is on customer retention (Source: McKinsey)

- A customer is 4 times more likely to defect to a competitor if the problem is service related than price or product related (Source: Bain & Company)
- 68% of customers leave because they were upset with the treatment they received whilst speaking to customer services (Source: US Chamber of Commerce)
- The probability of selling to an existing customer is 60–70%. The probability of selling to a new prospect is 520% (Source: Marketing Metrics)
- For every customer complaint, there are 26 other unhappy customers who have remained silent (Source: Lee Resource)
- 96% of unhappy customers don't complain, however 91% of those will simply leave and never come back (Source: 1st Financial Training services)
- A 2% increase in customer retention has the same effect as decreasing costs by 10% (Source: Leading on the Edge of Chaos, Emmet Murphy & Mark Murphy)
- Customer profitability tends to increase over the life of a retained customer (Source: Leading on the Edge of Chaos, Emmet Murphy & Mark Murphy)

We have seen many of the matters described above be true in our client organisations, too. Many times their numbers are even more extreme than here. We can safely make the conclusion that Customer Journeys have financial implications for any business with customers.

11.2 Journey Efficiency

The biggest benefits from evaluating the Customer Journey efficiency comes from identifying the gaps between the customer and employee journeys. Typically, this offers both quick and big wins. The quick wins will come from fixing any immediate mismatches between the two journey. This could mean stopping doing some unnecessary work or realigning some of the work. Big wins will come from balancing all the work between each Journey Step. Also starting to serve previously unserved Journey Steps may generate new revenue sources.

To improve Journey Steps efficiency, you can ask questions such as:

- How can we optimise the Customer Journey Steps?
- How well aligned are customer and employee journeys?
- How can we validate the Journey Steps with real customers?
- How will we measure our performance on this Customer Journey?
- Where are the immediate quick wins to improve?
- What would change the journey to significantly better?

Second place to get journey efficiency improvements are the Customer Interactions, aka Touchpoints. There are two steps to optimising the Touchpoints. First is to eliminate as many of them as possible. Yes, you read correct. Less customer Touchpoints is better. So remove any unnecessary and non-value creating Interactions. Step two is to standardise the ones left. Don't worry, standardising Interactions does not mean that the standards are exactly same for all customers. They are more like "golden rules" for engagement. For example, call centre agents can discount the products they sell between 15% to 20%. Customer Interaction standards can also limit options, such as offer the customer the choice of one, two or four days' delivery. As you can see, this also creates a connection between Customer Interactions and Business Rules.

To improve Touchpoint efficiency, you can ask questions such as:

- Which Touchpoints we can eliminate?
- How will we standardise the Touchpoints we can't eliminate?
- What customers need, want or value at each Touchpoint?
- How each Touchpoint is aligned to our organisational values?
- What does each interaction make the customer feel?
- What is the best way to implement each Touchpoint?
- How can we create a WOW experience with each Touchpoint?

Third place to improve is the employee journey. The simpler it is, the more efficient. We already discussed about aligning the customer and employee journeys. In one telecommunications company we were able to achieve a cost saving of £800k within four months by doing this. We mapped the Customer Journey and then aligned their process maps (i.e. employee journey) to that. It revealed several areas where there was too much work done for specific Customer Journey Steps. That work was removed and they could save costs fairly easily (and certainly quickly). If you are familiar with Lean and Six Sigma approaches, you can apply them also in to the employee journey. Quicker way (and many times more efficient) is to do the same for employee journey as you would do for Touchpoints. First eliminate as many as you can and then standardise the rest.

To improve the employee journey (Breakpoints) efficiency, you can ask questions such as:

- Which Breakpoints we can eliminate?
- How should we standardise the Breakpoints that are left?
- How can we improve the Breakpoints to give maximum value with minimum effort?
- What does each Breakpoint make the employee feel?
- What is the best way to implement each Breakpoint?

Fourth place to focus on finding efficiency is the Business Rules map. They are little bit different compared to how we handle Touchpoint and Breakpoint efficiency. The quick win in Business Rules efficiency is to identify those Rules that are still in place, but obsolete. It is very likely that at least 20% of Rules along the Customer Journey are not needed anymore. Then you can do the same as with Touchpoints and identify the ones that can be removed (potentially causing some changes). At this point you can also think about whether some new rules are needed for standardising the customer or employee journey on a sensible level.

After you have optimised all the previous, it is time to think about rest of the details. Use the same elimination, improvement approach we used previously. Then the final thing to consider are the Customer Emotions. Which negative emotions can be turned into positive? And what positive emotions do you want to evoke in customers?

Now you should have looked at the journey from different perspectives be able to take action to create a new Customer Journey Map, which will be much more efficient than the current one.

11.3 Choosing Where to Focus

The whole point of mapping Customer Journey is to find out the key areas to focus on. This will make our discussion in this book fairly generic in terms of what to focus on specifically in your business. Still, there are some things that deserve to be focused on regardless of the organisation, so let's go them through.

The main focus on a Customer Journey should be around inconsistencies. One of the most common challenges with Customer Journeys is inconsistency of the experience. Rockefeller Corporation did a research on why customers stop doing business with companies and found that almost 70% leave, because they feel that the company doesn't care about them. This is a result of failure to engage customers emotionally along the journey. When working with Customer Journey Maps, we need to balance the Journey itself, Touchpoints, Breakpoints and Emotions to offer an optimal Journey. Therefore, the focus should be on aligning as well ensuring consistency across the whole end-to-end Customer Journey.

Your focus on Touchpoints should be in the outcome of the interaction. At the end of the day, the customer will behave based on one of these options: either they say (or write) something good, bad or say nothing at all about the organisation or its products (or services). Logical probability forecasts that the greater Touchpoints the business delivers, the greater the chance the customer will feel great and say positive things about organisation and its products or services. Focus on removing and improving those Touchpoints that will lead to bad comments or to none at all. This will have huge impact on your NPS (Net Promoter Score) also if you happen to use it.

There are two more key areas to focus on: Breakpoints and Emotions. Breakpoints are the source of costs for the business. Basically the more you have Breakpoints, the more work is done to realise the Customer Journey and the more it will cost. So, it is best to focus on minimising and optimising the employee journey, i.e. Breakpoints.

Customer Emotions are the cherry on the top. Today's customers expect price, logistics, features and such matters to be on an acceptable level. This leaves the emotions to play much bigger part than in the past. Actually, this is one of the biggest market environment changes in the past decade that has been missed by many companies. Focusing on creating a positive emotional journey, will directly impact the bottom line through customer engagement, especially repurchase and continued use of services provided by your organisation.

12 Summary

12.1 Shaping The Organisational Culture Using Journey Maps

Organisational culture can be quite a fluffy topic. In business dictionary (www.businessdictionary.com) it has been defined as "the values and behaviours that contribute to the unique social and psychological environment of an organisation". They continue, "organisational culture includes an organisation's expectations, experiences, philosophy, and values that hold it together, and is expressed in its self-image, inner workings, interactions with the outside world, and future expectations. It is based on shared attitudes, beliefs, customs, and written and unwritten rules that have been developed over time and are considered valid." This fits well with what we include in the Customer Journey Maps. Breakpoints map the internal workings, Touchpoints map the external interactions, Business Rules map the valid rules and Journey Steps map the expectations.

Organisational culture, brought visible by the Customer Journey Mapping, shows in many ways (adapted from the business dictionary):

- The ways the organisation conducts its business (Breakpoints), treats its employees, customers (Touchpoints) and the wider community (Stakeholders).
- The extent to which freedom is allowed in decision making (Business Rules), developing new ideas, and personal expression (Emotions).
- How power and information flow through its hierarchy (Journey Steps, Stakeholders, Breakpoints, Touchpoints).
- How committed employees are towards collective objectives (Breakpoints and Emotions).
- Shared language to discuss about the customers and organisational alignment to producing value in effective way (Customer Journey Map)

Organisational culture is really important, because it impacts both productivity and performance. It is worth noticing, the organisational culture is unique for every organisation and one of the hardest things to change or copy from others. Great organisational culture is a valuable asset and competitive advantage. Since culture is what people collectively do together, we want them to think about the customer as part of their daily job. The change in collective mindset (I.e. The culture) has to become more customer-centric. Customer Journey Maps can help in doing it.

What is missing for most organisations is an “Experience Culture” – a culture for producing remarkable customer experiences with the products or services and the brand of the organisation. Customer Journey Mapping framework can provide a structure for defining and consistently delivering customer-centric touchpoints in an efficient way. The Experience Culture also emphases understanding emotions and the importance of reaching a successful customer outcome in most effortless way. Organisations should live for taking customers to an amazing journey from un/recognised desire to successful outcome.

Achieving an alignment between customers, employees and finances is key for building a customer-centric culture. Unless all stakeholders have shared values, goals and expectations, it will show as a broken culture, inconsistent experience and silo working. Using the Customer Journey Maps constantly will impact the culture positively in long-term. People need tools such this to make it practical. It enables them to make decisions based on the insight generated from the maps.

12.2 Taking Action to Improve

The Customer Journey Mapping method presented in this book has proven to be part of a most effective business optimising approach we have ever seen. We have been head to head with some of the best Lean Six Sigma experts in the industry and still come out of those projects as a clear winner. We have re-optimised already optimised projects with double-digit performance improvements. I don't say this to boast how great we are; I am doing it to say how effective this method can be when used to take action to improve. Though the scope of this book is mainly around the mapping itself rather than optimising the journey, we will still go through some principles that will get you started on taking action, too.

You can get started by identifying the right scope. That means selecting the customer journeys, steps and interactions with the greatest value to your organisation and the customer. These could be the ones causing most negative emotions, having highest number of Breakpoints or intuitive approach to fixing parts of the map that don't seem right.

Next focus on increasing value within the scope. Find out the ways you can identify and act upon the needs of your most valuable customers. We give you tools for this in our Customer Experience Blueprint method (available as our compliment to you at http://addvalueto.me/customer-experience-blueprint).

Then use prioritisation to get some quick wins and then big wins. Decide how to invest the resources of your organisation most effectively, based on the insights generated by the Journey Maps. We provide you with an organised approach on this through our Customer Experience Innovation framework.

Though Customer Journey Mapping focuses on micro optimising the details in the map, having a clear vision of the bigger picture is much needed to ensure right decisions. Create and put into action a customer-centric business vision, whether this involves increasing customer value, becoming the premier provider of a particular product or service, or being perceived as number one in your industry by customers. Then design an operational strategy by optimising the Touchpoints and Breakpoints to differentiate your organisation on service and value, not just on products and price. Use every Customer Interaction to target and personalise your services. By using outcome based segmentation you can distinguish most valuable customers in order to provide more value to them. Find out what what makes your customers engaged and manage that proactively.

Let's move forward. How do you take action to improve? Once you have completed mapping the existing state of the customer journey, ask these two key questions for each detail (sticky note) on the map:

1. How can we remove this?
2. If we can't remove this, how can we improve it?

Write down all the answers and then use that information to create a future state Journey Map. Once you have that Journey Map approved, create a project plan to change the organisation from the current state to the future state. It really is as simple as that! But I am not saying it is easy… Sounds too simple to work? The results may surprise you.

12.3 Your Journey Map to Customer Success

We are coming closer to the end of this book on making highly effective Customer Journey Maps. As you have already learned, Customer Journeys touch all areas of business and require more than just few sticky notes on the wall. Here are main steps for your macro journey on to customer success.

1. Start by defining target customers and understanding their needs across each step from desire to outcome. Recognise their unique journeys as they interact with your company. Start by focusing on the most important ones for the customer.
2. Map Customer Journeys and Touchpoints and use them to identify and remove Breakpoints and barriers to customer progression. Learn how customers feel about interacting with your organisation by mapping out the emotions along the journey.
3. Align your systems and tools, data and processes with Customer Journeys, and leverage them to support successful customer outcomes across all channels.
4. Use the Voice of Customer as a way to improve the business. Do that by listening to customers regularly, acting on what you learn proactively and incorporating insights into decision-making that leads into action.
5. Engage executives, management and employees in making customer-centricity real by consistently communicating the importance of customer experience to all stakeholders. Become a customer-driven organisation instead of shareholder.
6. Measure and improve organisational performance by using customer-focused KPIs, such as quality of customer experience
7. Engage employees. Incorporate employee ideas, feedback and insights into the on-going process of customer experience design and delivery.

The Final Conclusion

The journey to true customer-centricity isn't an easy one; and not all organisations achieve it. You will need to put conscious effort on developing critical new sets of organisational capabilities, like Customer Journey Mapping, to help understand how you interact with and serve your customers. Today is the right time to get started!

13 Author's Recommended Resources

13.1 Recommended Online Training

Customer Experience Blueprint online training

http://addvalueto.me/customer-experience-blueprint

13.2 Recommended Reading

Extreme Trust: Honesty as a Competitive Advantage (Penguin, 2012)

Touchpoint Power! Get & Keep More Customers, Touchpoint by Touchpoint – Foreword by Peppers & Rogers by Hank Brigman

CRM, Managing Customer Relationships: A Strategic Perspective (Wiley, 2nd edition, 2011)

14 About the Author

14.1 Dr. Janne Ohtonen

Dr. Ohtonen has delivered tens of challenging change programs, with double-digit performance enhancement in many of them. He holds Ph.D. and has contributed to a number of scientific research papers including developing organisation's business process management capabilities. His approaches are acknowledged as thought leadership and used in a number of organisations today. Dr. Ohtonen is a regular contributor all over the world to C-level roundtables, MBA courses and international conferences as keynote speaker. He delivers expertise in Customer Experience Management, Business Process Management, principles of leadership, innovation and change.

Dr. Ohtonen believes that the most dramatic changes to organisations effectivity and performance comes through an alignment of customer experience to business processes, enterprise architecture and innovation. That requires both leadership and commitment, which he is willing to offer for you.

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